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ABSTRACT

Chapter 1 of this status report on the implementation of individually guided education (IGE) states that this report is intended to serve the following two purposes: (1) to complete all the reported requirements relative to implementation funding provided by the U.S. Office of Education and the National Institute of Education and (2) to summarize the strategies, efforts, and results of implementing IGE nationally since 1971. Chapter 2 briefly describes the rationale for the development of IGE, the major components of IGE, and important events in its development and early implementation efforts. Chapter 3 focuses on the objective for the implementation program at the Wisconsin Research and Development Center for Cognitive Learning, a description of a model for implementation, a description of the IGE support system, and the theoretical foundations and validation of IGE implementation strategies. Chapter 4 describes the history of the relationship of the Wisconsin Research and Development Center to states and the development of state IGE networks. It also includes a descriptive status report of the Research and Development Center as of September 30, 1974 and a discussion of further directions. Chapter 5 presents a history of leadership development activities and an evaluation of the leadership workshops. The report also includes numerous tables, figures, and appendices relating to IGE and the implementation of IGE programs, as well as a list of references. (BD)

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TECHNICAL REPORT NO. 345
(PART 1 OF 2 PARTS)

a status report on the implementation of ige: 1971-1974

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JULY 1975

WISCONSIN RESEARCH
AND DEVELOPMENT
CENTER FOR
COGNITIVE LEARNING

Technical Report No. 345 (Part 1 of 2 Parts)

A STATUS REPORT ON THE IMPLEMENTATION OF IGE: 1971-1974

by James E. Walter, Booker T. Gardner, and Harold G. MacDermot

Report from the Project on Materials and Strategies
for IGE Staff Development and Implementation

Based on a Final Report to the National
Institute of Education for Grant No. NE-G-00-3-0221

Wisconsin Research and Development
Center for Cognitive Learning
The University of Wisconsin
Madison, Wisconsin

July 1975

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Center Contract No. NE-C-00-3-0065

WISCONSIN RESEARCH AND DEVELOPMENT
CENTER FOR COGNITIVE LEARNING

MISSION

The mission of the Wisconsin Research and Development Center for Cognitive Learning is to help learners develop as rapidly and effectively as possible their potential as human beings and as contributing members of society. The R&D Center is striving to fulfill this goal by

- conducting research to discover more about how children learn
- developing improved instructional strategies, processes and materials for school administrators, teachers, and children, and
- offering assistance to educators and citizens which will help transfer the outcomes of research and development into practice

PROGRAM

The activities of the Wisconsin R&D Center are organized around one unifying theme, Individually Guided Education.

FUNDING

The Wisconsin R&D Center is supported with funds from the National Institute of Education; the Bureau of Education for the Handicapped, U.S. Office of Education; and the University of Wisconsin.

ACKNOWLEDGMENTS

The authors gratefully acknowledge the authors of prior reports and publications which are referenced in this report. A special debt is acknowledged to Professor Herbert J. Klausmeier who, in cooperation with personnel from all over the nation, started, and has continued to provide leadership to, the development and implementation of IGE.

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I

INTRODUCTION

This report is intended to serve two purposes: the first is to complete all the reporting requirements relative to implementation funding provided by USOE and NIE[1]; the second is to summarize the strategies, efforts, and results of implementing IGE nationally since 1971.

Chapter II of this report briefly describes the rationale for the development of IGE, the major components of IGE, and important events in its development and early implementation efforts. Chapter III focuses on the model and basic strategies which guide the implementation of IGE. Chapter IV describes the history of the relationship of the Wisconsin Research and Development Center for Cognitive Learning to states and the development of state IGE networks. Chapter V presents a history of leadership development activities and an evaluation of the leadership workshops.

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[1] This is based on the final report for Grant No. NE-G-00-3-0221 which was awarded to the Wisconsin Research and Development Center for Cognitive Learning by the National Institute of Education for the period July 1, 1973 to October 30, 1974.

II

HISTORY OF THE DEVELOPMENT AND IMPLEMENTATION OF IGE

In this chapter, attention will first be directed to summarizing the rationale for the development of IGE. Then the major components of the system of Individually Guided Education will be described. Following this description, the major events in the history of the implementation of IGE will be noted.

RATIONALE FOR THE DEVELOPMENT OF IGE

American public education has been both praised and condemned by a variety of notable persons. While substantial evidence can be (and has been) marshalled in support of both views, the perspective adopted by the Wisconsin Research and Development Center for Cognitive Learning suggests that while the present form of schooling is in many respects undesirable, it also has several desirable and beneficial characteristics. The R & D Center, early in its history, adopted the position that an alternative form of public, tax-supported schooling should be developed and that such an alternative should systematically attempt to ameliorate the least desirable characteristics and enhance the desirable benefits.

The general approach to development created by the R&D Center had three dimensions. First, the undesirable characteristics were delineated. Second, the corrective responses to these conditions, as well as the desirable characteristics, were conceptualized in terms of a complete system which would be an alternative form of schooling. Third, the development, evaluation, and refinement of the system were conducted in an iterative process involving the cooperation of personnel from the R & D Center, state education agencies, teacher education institutions, and local education agencies.

The process of identifying and categorizing the less favorable organizational and procedural characteristics of the age-graded, self-contained form of elementary schooling, which had not changed substantially since its inception in the middle nineteenth century, concluded in the following statements:[2]

- Students are required to adjust to uniform educational programs. Appropriate provisions are not made for differences among them in their rates of learning, levels of motivation, and other characteristics.

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[2] The following material describing IGE (to page 12) is adapted from a draft of Chapter 1, "IGE: An Alternative Form of Schooling," by James M. Lipham and Herbert J. Klausmeier in The Principalship of an IGE School, Madison: The UW/SRF IGE Teacher Education Project, 1974.

- Students are placed in age-graded classes and are expected to attain the same instructional objectives (frequently not specified) by studying the same graded basic textbooks and supplementary materials.
- Students are frequently evaluated by the use of norm-referenced tests of intellectual ability and educational achievement. Such tests are often used for categorizing and grading students, not for improving instruction.
- Teachers are treated as if they are equally competent in all subject fields, all media, and all methods of instruction. Appropriate provisions are not made for differences among teachers in interests, knowledge, experience, and expertise.
- Teachers spend nearly all of their time throughout the school day with children. Little time is available during the school day for planning and evaluating instructional activities.
- The principal is a manager rather than an educational leader. The teacher is an independent ruler of a classroom rather than a cooperative team member. Administrative arrangements do not encourage cooperative planning and decision making.
- The staff spends most of its energy in keeping school going. Little effort is devoted to research and development activities that are essential to continuous improvement of educational practice.
- The staff of each school functions in relative isolation from other schools. Communication networks for sharing creative ideas, materials, and instructional approaches function only sporadically, causing many to "reinvent the wheel."
- The typical school building is inflexible, resembling an egg crate in its structure. Access to library, audiovisual, and other instructional materials and aids is circumscribed, and space configurations seriously limit varied types of grouping and learning activities.
- Parent contact with the schools is largely negative, concerned mainly with problems of school finance or student discipline. The primary means of communication between the school and the home are report cards or parent-teacher conferences, supplemented occasionally by a school newsletter.

After the preceding conditions were considered, the desirable conditions for teaching and learning were described: The educational process should focus attention on the individual learner as a person with unique characteristics, capabilities, concerns, need-dispositions, and motivations. Focusing attention on the individual learner can be accomplished through the following four operations:

1. Assessing the level of achievement, learning style, and motivation of each student by the use of criterion-referenced tests, observation schedules, and work samples prior to beginning instruction.
2. Setting specific instructional objectives for each student to attain over a short period of time.
3. Planning and conducting instructional activities suitable for each student through varying the amount of guidance by the teacher, the amount of time spent in interaction among students, the use of resources, materials, equipment, and direct experience, and the amount of time spent by each student in different types and sizes of learning groups.
4. Assessing each student for attainment of his initial objectives in order to set new instructional objectives to be attained.

A Description of the System of IGE

In IGE, the broad range of the phenomena one ordinarily associates with education was conceptualized into seven components (see Figure 1):

1. An organizational arrangement for administration and instruction (the MUS-E).
2. A model of instructional programing for the individual student (the IPM).
3. Measurement and evaluation for educational decision making.
4. Curriculum and instructional materials and activities.
5. Home-school-community relations.
6. Facilitative environments.
7. Continuing research and development.

Each of these components is now briefly described.

1. The Multiunit School-Elementary (MUS-E). The MUS-E (see Figure 2) was designed to produce an environment in a school building that would facilitate instructional programing for the individual student and the introduction and utilization of the other components of IGE. The MUS-E is a new organizational structure that has emerged from a synthesis of organizational theory and practice in the field of education. The MUS-E is designed to: (1) articulate vertical and horizontal organizational relationships; (2) affix organizational roles and responsibilities; (3) facilitate immediate and long-range planning; (4) increase involvement in educational decision making; (5) improve communication among school personnel; and (6) enhance the satisfaction and sense of belonging of each person involved in the educational process.

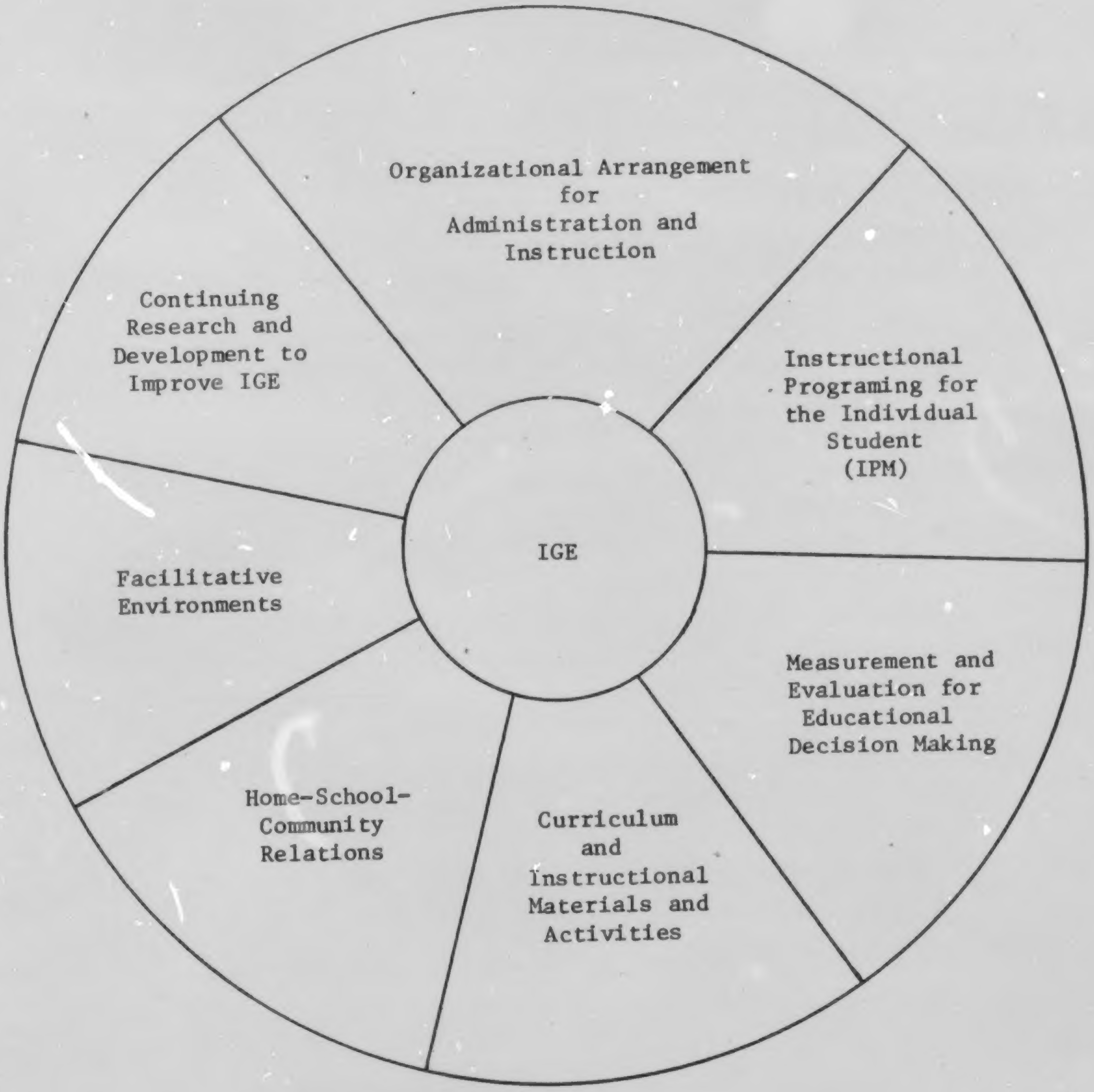
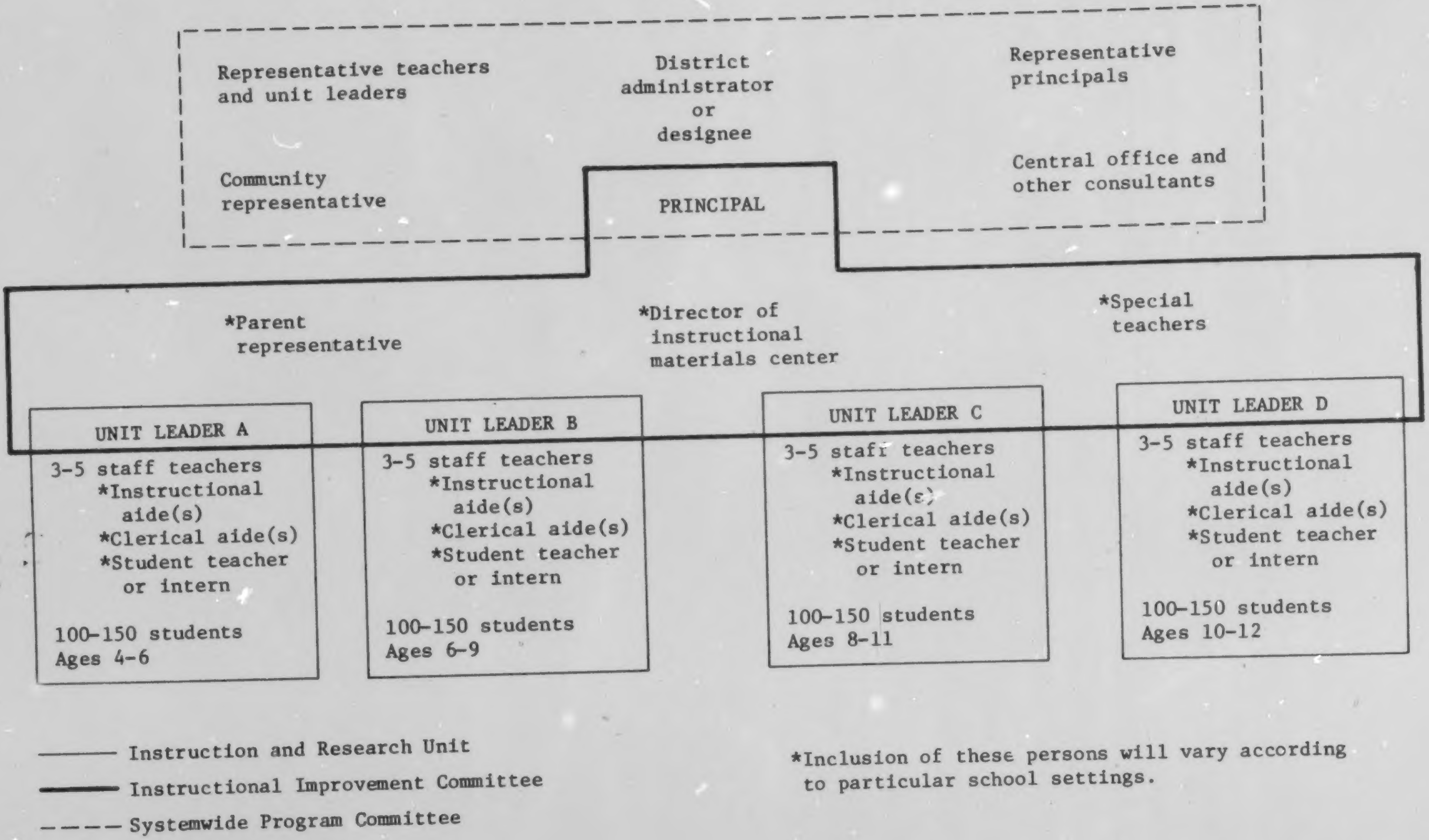

Organizational Arrangement for Administration and Instruction
Instructional Programing for the Individual Student (IPM)
Measurement and Evaluation for Educational Decision Making
Curriculum and Instructional Materials and Activities
Home-School-Community Relations
Facilitative Environments
Continuing Research and Development to Improve IGE
IGE

Figure 1. Seven components of IGE.

Based on Klausmeier, Quilling, Sorenson, Way, and Glasrud, Individually Guided Education and the Multiunit Elementary School: Guidelines for Implementation, Madison: Wisconsin Research and Development Center for Cognitive Learning, 1971.


Representative teachers and unit leaders
District administrator or designee
Representative principals
Community representative
PRINCIPAL
Central office and other consultants
*Parent representative
*Director of instructional materials center
*Special teachers
UNIT LEADER A
3-5 staff teachers
*Instructional aide(s)
*Clerical aide(s)
*Student teacher or intern
100-150 students
Ages 4-6
UNIT LEADER B
3-5 staff teachers
*Instructional aide(s)
*Clerical aide(s)
*Student teacher or intern
100-150 students
Ages 6-9
UNIT LEADER C
3-5 staff teachers
*Instructional aide(s)
*Clerical aide(s)
*Student teacher or intern
100-150 students
Ages 8-11
UNIT LEADER D
3-5 staff teachers
*Instructional aide(s)
*Clerical aide(s)
*Student teacher or intern
100-150 students
Ages 10-12
Instruction and Research Unit
Instructional Improvement Committee
Systemwide Program Committee

*Inclusion of these persons will vary according to particular school settings.

Figure 2. Organizational chart of IGE school of 400-600 students.

Based on Herbert J. Klausmeier, Richard G. Morrow, and James E. Walter, Individually Guided Education in the Multiunit School, Madison: Wisconsin Research and Development Center for Cognitive Learning, 1968.

At the classroom level in the MUS-E is the Instruction and Research (I & R) Unit. The nongraded I & R Unit replaces both the age-graded, self-contained classroom and the departmentalized forms of organization for instruction. A typical I & R Unit includes the following personnel: a unit leader, three to four other staff teachers, a first-year teacher or resident, a teacher aide, an instructional secretary, an intern, and 100-150 students.

The main functions of the I & R Unit are (1) to plan, carry out, and evaluate instructional programs for each student in the unit; (2) to engage in continuous inservice staff development activities; (3) to provide inservice teacher education activities; and (4) to plan and conduct cooperatively, often with other agencies, a systematic program of research and development.

At the second organizational level, the building level, is the Instructional Improvement Committee (IIC). The IIC, comprised of the principal, the unit leaders, support personnel (e.g., Resource Materials Center director), and community/parent representatives, is organized and chaired by the principal.

The four main functions of the IIC are (1) stating the general educational objectives and outlining the educational program for the entire school building; (2) interpreting and implementing systemwide and statewide policies that affect the educational program of the building; (3) coordinating the activities of the I & R Units to achieve continuity in all curricular areas; and (4) arranging for the use of the time, facilities, and resources that are not managed independently by the units. The IIC thus deals primarily with the planning, decision making, and coordinating functions related to instruction.

The Systemwide Program Committee (SPC) is at the third or district level of the organization. The SPC is chaired by the school superintendent or his designee and includes representatives from the central office, principals, unit leaders, teachers, and community representatives.

The four decision-making and facilitative responsibilities for which the SPC takes primary initiative are (1) identifying the functions to be performed in each IGE school of the district; (2) recruiting personnel for each IGE school and providing for their inservice education; (3) providing the essential physical resources and instructional materials; and (4) planning an effective program of home-school-community relations. A central office structure alternative to the SPC may be responsible for these functions; considerable flexibility is required since local school districts differ greatly in size and other characteristics.

2. The Instructional Programing Model (IPM). At the heart of IGE is the Instructional Programing Model (IPM) for the individual student (see Figure 3). It takes into account the beginning level of performance, rate of progress, style of learning, motivational level, and other characteristics of each pupil in the context of the educational program of the school. Instructional programing for the individual student must be appropriately planned and implemented in the cognitive, psychomotor, and affective domains. It can be used

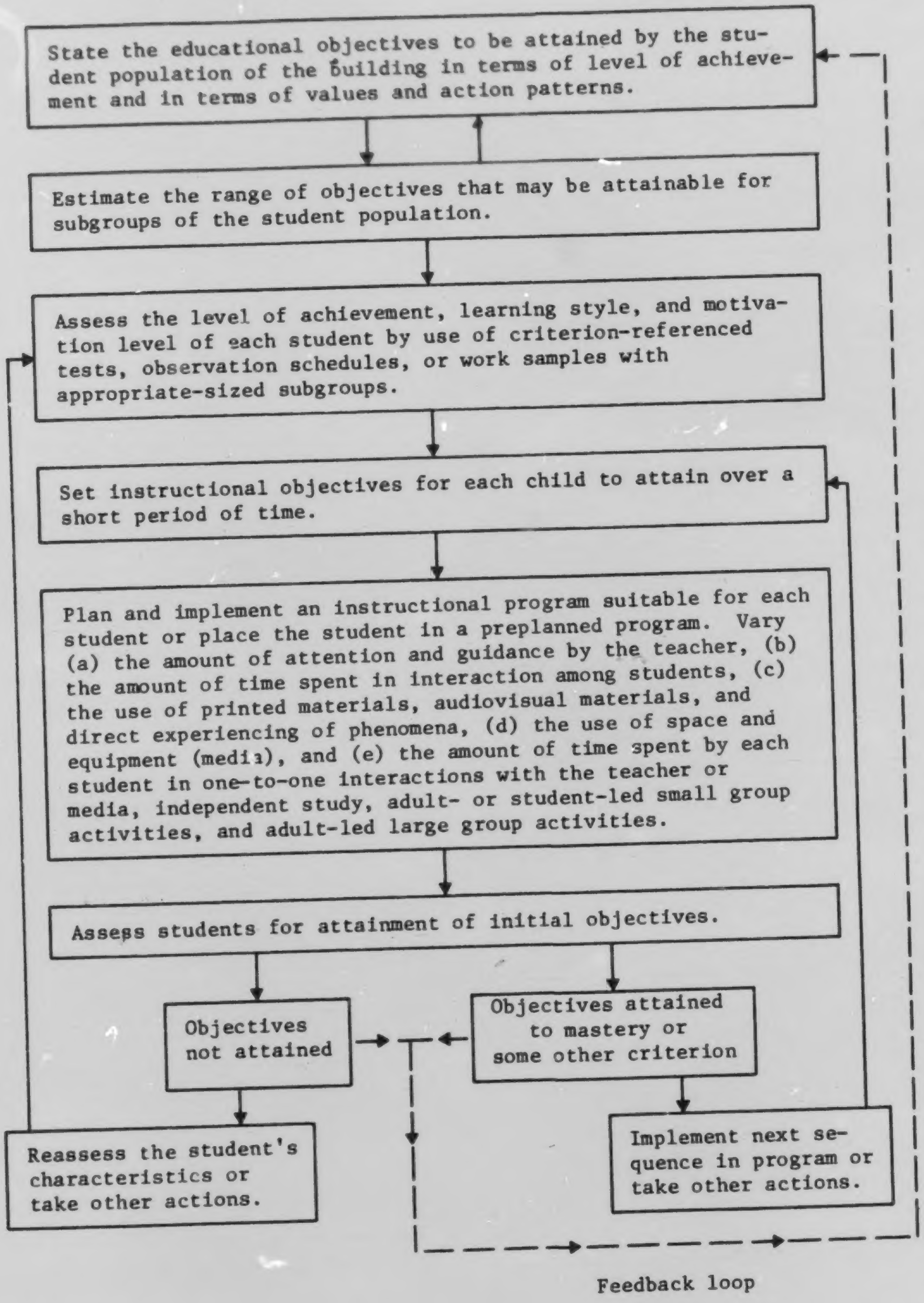

State the educational objectives to be attained by the student population of the building in terms of level of achievement and in terms of values and action patterns.
Estimate the range of objectives that may be attainable for subgroups of the student population.
Assess the level of achievement, learning style, and motivation level of each student by use of criterion-referenced tests, observation schedules, or work samples with appropriate-sized subgroups.
Set instructional objectives for each child to attain over a short period of time.
Plan and implement an instructional program suitable for each student or place the student in a preplanned program. Vary (a) the amount of attention and guidance by the teacher, (b) the amount of time spent in interaction among students, (c) the use of printed materials, audiovisual materials, and direct experiencing of phenomena, (d) the use of space and equipment (media), and (e) the amount of time spent by each student in one-to-one interactions with the teacher or media, independent study, adult- or student-led small group activities, and adult-led large group activities.
Assess students for attainment of initial objectives.
Objectives not attained
Objectives attained to mastery or some other criterion
Reassess the student's characteristics or take other actions.
Implement next sequence in program or take other actions.
Feedback loop

Figure 3. Instructional programing model in IGE.

Based on Klausmeier, Quilling, Sorenson, Way, and Glasrud, Individually Guided Education and the Multiunit Elementary School: Guidelines for Implementation, Madison: Wisconsin Research and Development Center for Cognitive Learning, 1971.

either with explicitly stated instructional objectives that specify mastery, or with expressive and general objectives that imply activities to be carried out or progress to be made.

3. Measurement and Evaluation for Educational Decision Making. The third major component of IGE is measurement and evaluation for decision making at all levels of the organization. Evaluation processes pervade the IGE school, relating to such essential functions as staff personnel, curriculum development, resource management, and home-school-community relations, but they converge on the individual student in the IPM. The assessment of the student's learning characteristics and performance is aimed at providing information at three stages: (1) at the beginning of a unit of instruction; (2) at various times throughout the instructional sequence; and (3) at the end of a unit of instruction.

4. Curriculum and Instructional Materials and Activities. The success of IGE depends heavily upon the availability of curricular materials compatible with the IPM and related processes of measurement and evaluation for educational decision making. Principal investigators, scientists, and staff personnel at the Wisconsin Research and Development Center have developed curricular and instructional materials that are suitable for use in IGE and other schools. These are the Wisconsin Design for Reading Skill Development (WDRSD), Individually Guided Motivation (IGM), Developing Mathematical Processes (DMP), and the Pre-Reading Skills Program (PRS).

These IGE-related curriculum and instructional products were developed for two basic reasons. First, as already indicated, the products are vitally needed in IGE schools. The Center was unable to identify existing products which incorporate or adapt both the IPM and the measurement and evaluation model of IGE. The IPM and the measurement and evaluation model are helpful to the school staffs in planning and designing instructional activities and programs for students; but without appropriate instructional materials, staff members are faced with the substantial task of either developing or adapting materials. Thus, the development of such materials was deemed important to the success of IGE. Second, it is not expected or required that these products be used only in MUS-E schools. In other words, the materials, procedures, and approaches are considered important in their own right because they are designed to contribute to the improvement of educational practices in any kind of organizational setting--MUS-E, conventional age-graded classrooms, open educational schools, and the various modifications of each.

5. Home-School-Community Relations. Since any system of public education requires the public's understanding of the program within the school, the successful implementation of IGE largely depends upon an active program of home-school-community relations. The following are three general aims of a home-school-community relations program:

1. To make the staff of the school more aware of available resources and more responsive to the educational expectations of the community, parents, and children.

2. To make the community, parents, and children more aware of and responsive to the requisites of the instructional program implemented through IGE.
3. To identify and utilize ways and means of actively involving both staff and community in the awareness of, changeover to, refinement of, and establishment of IGE.

6. Facilitative Environments. It was recognized early in IGE research that a system of facilitative environments is required to help schools make the changeover to IGE and to strengthen and support each IGE school so that each school becomes increasingly self-renewing. The MUS-E structure was conceptualized to produce the facilitative environment in the school and school district. At these levels, particular attention is focused on obtaining, providing, and managing the physical, human, and material resources which constitute the learning environment.

Beyond the school and district level, facilitative environments include the linkages and relationships which must be established and sustained between the school district and the larger environment, including other school districts, the state education agency, teacher education institutions, state and local teacher associations, and state lay organizations.

The organizational structure of the state IGE network, like that of the MUS-E, is a tri-level hierarchical arrangement which structures the relationships with these external agencies (Klausmeier, Walter, & Lins, 1974). At the lowest level are the Systemwide Program Committees (SPCs) of school districts (these were discussed in the section describing the MUS-E).

At the second level is the Regional IGE Coordinating Council (RICC) comprised of representatives of SPCs of a region, of the intermediate education agency(ies) and teacher education institution(s) of a region, and from the state education agency. The RICC includes a regional IGE coordinator and representatives of the agencies which together are able to start and maintain IGE schools in the particular region of a state.

At the third level is the State IGE Coordinating Council (SICC). The SICC includes the state IGE coordinator, key personnel of the state agency, and representatives of the RICCs of the state.

7. Continuing Research and Development. The seventh component of IGE is a program of continuing research and development which produces validated instructional materials and procedures. Local schools must continuously conduct evaluative research when implementing the IPM in order to assess its effectiveness. Larger school districts and state education agencies also evaluate their IGE programs. Development and development-based research are conducted by the Wisconsin Research and Development Center and other agencies to develop and improve each component of IGE. The development and refinement of the specific components of IGE and of other comprehensive educational systems and products require a continuing commitment by the specialized capabilities and resources found in colleges and universities, R & D centers, regional education laboratories, state education agencies, and other profit and nonprofit organizations.

What is an IGE School? Given the extensive nature of IGE and its flexibility (for example, MUS-E schools are not required to use the curriculum and instructional products of the Research and Development Center), the definition of an IGE school has two aspects. First, a school implementing IGE never completes such implementation, since one of the important characteristics of IGE is that it facilitates the continuing improvement of educational practice: it is a self-renewing system. Thus, the formal definition of an IGE school is elusive and is best described by processes rather than by content or substance.

The second aspect of the definition of an IGE school is more concrete. A beginning IGE school is one that has implemented the MUS-E organizational pattern and the models for instructional programing and measurement and evaluation in at least one curriculum or subject matter area. As an IGE school staff becomes more experienced, it will expand the implementation of the IPM and related measurement and evaluation to other curricular areas, will participate in the relationships of the facilitative environments, and will develop a program of home-school-community relations. In this sense, the implementation of IGE in a school will require from five to seven years.

Inservice during the changeover period usually results in initially implementing the MUS-E organization and the IPM, with its related measurement and evaluation, in one subject matter area. Other components are implemented subsequently. Inservice materials have been designed by the R & D Center with this kind of implementation in mind.

History of the Implementation of IGE

The following is a brief summary of the history of the diffusion of IGE under the aegis of the R & D Center:[3]

1966	The first 13 nongraded I & R Units were started in 3 Wisconsin school districts.
1967	Seven schools in 3 Wisconsin districts were completely organized into IGE schools.
1968	The Wisconsin Department of Public Instruction officially endorsed IGE and began the statewide implementation in 8 new schools which served as "lighthouse" or demonstration schools. Four teacher education institutions were also involved.

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[3] The reference in the following sequence is to IGE schools; this does not mean that the total system of IGE was implemented, but that the MUS-E, the IPM, and the measurement and evaluation components were implemented. As the Center's curriculum and instructional materials become available for widespread adoption, many of the IGE schools will adopt them, but such is not required.

1969 Fifty more IGE schools were implemented in Wisconsin school districts.

1970 Ninety-nine IGE schools were implemented in 7 states, bringing the total to 164 schools.

1971 Prior to this year, no funds had been provided to the Center for implementation of IGE. Prior installations had come mainly through school personnel who had visited the Center and had made their own arrangements for implementation. In 1971, DHEW and USOE selected IGE for national implementation and awarded funds to the Center to begin the effort. With these funds, approximately 280 new schools were established in 13 states.

1972 With a second year of funding from USOE, an additional 620 schools were implemented, bringing the total to over 1000.

1973 Support for the implementation of IGE was discontinued by USOE. As a consequence, the state coordinating agencies did not make plans in the spring of 1973 to increase substantially the number of new schools but rather to provide maintenance and refinement of continuing schools. Nonetheless, about 200 new schools were implemented, bringing the total to approximately 1200.

In the summer of 1973, NIE awarded funds to the Center to support a third year of IGE implementation. Some funds were used by the states to support maintenance and refinement activities and to begin the formation of state IGE networks. The Center used part of these funds to conduct leadership workshops to prepare new IGE implementors in the states and to give additional training to experienced IGE coordinators.

1974 By the summer of 1974, an estimated 100 additional schools had implemented IGE, bringing the total implemented under the aegis of the R & D Center and cooperating agencies to approximately 1300.

Three other events are of significance to the diffusion of IGE. In 1969, the R & D Center and the Institute for the Development of Educational Activities (/I/D/E/A/) of the Kettering Foundation signed an agreement to cooperate in the production of inservice materials based on materials that had previously been developed by the Center. The materials were used cooperatively by the Center and /I/D/E/A/ until early 1972. At this time, the implementation strategies and conditions for use of the materials as specified by /I/D/E/A/ were judged to be imcompatible with the strategy of the Center. The Center then developed new inservice materials and combined them with other inservice materials dealing with several R & D Center curriculum and instructional products. /I/D/E/A/ has continued to be involved in the implementation of IGE, and agencies are able to choose from either or both sets of strategies and materials. The R & D Center estimates that approximately 700 IGE schools have been implemented solely under the aegis of /I/D/E/A/, bringing the total of IGE schools to approximately 2000 in 35 states. (A number of agencies are now implementing IGE without any formal agreement with either of the two primary agencies; thus, the number of IGE schools may in fact be larger than estimated, but neither primary agency has any record of such implementation.)

The second major event was the funding of the University of Wisconsin/Sears-Roebuck Foundation IGE Teacher Education Project by The Sears-Roebuck Foundation (Klausmeier & Walter, 1972). Late in the summer of 1972, the University of Wisconsin-Madison School of Education was awarded funds to plan a project related to preparing materials which could be used in undergraduate and graduate, teacher and administrator, education programs. The objectives of the project are to develop teacher and administrator education materials and to support the development of state IGE networks. Although the project is fiscally and administratively independent of the Center, it is cooperating closely with the Center in implementation and other activities.

A third significant event took place in the spring and summer of 1973 when state IGE coordinators and representatives of a consortium of teacher education institutions took the initiative to establish a national professional association for persons involved in IGE. The Association for Individually Guided Education (AIGE) was incorporated in 1974 as a nonprofit organization. The responses to the first two annual national IGE conferences sponsored by AIGE are an encouraging measure of the acceptance of IGE. In November 1973, an estimated 400 persons attended the First Annual National IGE Conference. One year later, an estimated 1300 persons, primarily principals and teachers, from 31 states and Canada attended the Second Annual National IGE Conference. A more complete description of AIGE is presented in Chapter III.

Summary

IGE is a comprehensive alternative form of schooling. Its rate of implementation over the past seven years has been enhanced by funds from USOE and NIE, by contributions from The Sears-Roebuck Foundation, by the efforts of /I/D/E/A/, and by the commitment to IGE by thousands of local education agencies, state education agencies, and teacher education personnel in 35 states. With the establishment of AIGE, a national network has been formed involving local IGE schools, intrastate leagues and networks, statewide IGE networks, and a national association.

III

STRATEGIES FOR IMPLEMENTING IGE

In this chapter, attention will be directed to: (1) the objective for the implementation program of the R & D Center; (2) a description of a model for implementation; (3) a description of the IGE support system; and (4) the theoretical foundations and the validation of IGE implementation strategies.

AN OBJECTIVE FOR IMPLEMENTING IGE

As an alternative form of schooling, IGE should be made available to every school, state education agency, and teacher education institution that may wish to become involved. The R & D Center is concerned that IGE be an established alternative form of schooling, not just another innovation that leaves only a trace of its existence on the educational landscape. The Center's implementation program is based on the following goal:

> IGE will become an established alternative form of schooling in the nation's educational system.[4]

The minimum indicators suggesting that this goal has been achieved are as follows:

1. At least 50 percent of the states have a financially independent state IGE network;
2. At least 10 percent of the elementary and secondary schools in each state are IGE schools;
3. At least 25 percent of the school districts in each state have IGE schools;
4. At least one teacher education institution in each state prepares prospective IGE teachers in its undergraduate programs;
5. At least one teacher education institution in each state prepares unit leaders in its graduate programs for teachers;
6. At least one teacher education institution in each state prepares IGE principals in its graduate programs for educational administrators;

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[4] No time frame is given for this objective since the funding to support these activities is an important contingency.

7. The state education agency in each state provides supportive IGE assistance to local schools, teacher education institutions, and other educational agencies;
8. At least five regional (multistate) IGE centers are established in the nation;
9. The Association for Individually Guided Education (AIGE) is a self-sustaining organization; and
10. There is a continuing and systematic R & D effort to support IGE.

From April 1971 to September 1974, the foundations were laid for achieving the Center's goal. Fourteen state IGE networks were initiated, and negotiations were started with leaders in 9 other states. In Wisconsin, more than 14 percent of the elementary schools and 25 percent of the districts had made the changeover to IGE. In the 14 initial states, at least one teacher education institution had become involved in IGE, but there are only 5 such agencies in all the states that began formally to provide undergraduate or graduate programs for IGE personnel. While the 14 initial state IGE networks had become less financially dependent on outside support, none had yet become fully independent. In all but 10 of the 23 states, the state education agency had become committed to supporting IGE to the extent of identifying a staff member as the part-time state IGE coordinator. Four regional IGE centers had been identified. AIGE, which had been in existence only since June 1973, had become able to support a half-time executive secretary and completely underwrite its annual conference. The continuing R & D effort was primarily the responsibility of the Wisconsin R & D Center and the UW/SRF Project, although other agencies had begun to incorporate various aspects of IGE into their research activities.

The efforts related to realizing the objective were initiated as recently as 1971. In slightly more than three years, the foundations were laid by which such an objective could be realized. Clearly, much remains to be done if the R & D Center's implementation objective is to be achieved.

A Model for Implementing IGE

Since 1971 when the national implementation of IGE was initiated, the activities of the Center had been guided by a model which defined efforts ranging from dissemination of information to prospective users to the establishment of IGE as an alternative form of schooling. Described originally in four phases (Project Plan and Budget Requests for the Nationwide Installation of Multiunit Schools, 1971), experience from 1971 through 1974 suggested that the model be conceptualized in five phases (Evers, Karges, & Krupa, in press). These phases are (1) awareness; (2) commitment; (3) changeover; (4) refinement; and (5) renewal.

1. Awareness. Decision makers in different agencies first become acquainted with IGE through a variety of means, including articles in professional journals, professional conferences, and word of mouth. However, such information is generally not sufficient for making decisions concerning adoption of the IGE program. In the awareness phase, efforts are made to provide sufficient information in face-to-face settings so that decision makers can feel comfortable in attempting to obtain agency commitment for adopting IGE.

2. Commitment. Decision makers and other agency representatives who have completed the awareness phase engage in a series of discussions with and presentations to other agency members and governing groups. These activities are designed to elicit reactions and to secure a decision as to whether to begin the implementation of IGE in some portion of the agency's program. Very often, outside resource persons are engaged to assist in the discussions and presentations.

3. Changeover. When an agency decides to adopt IGE, representatives are selected to attend appropriate workshops so that they may become fully knowledgeable in the concepts and practices of IGE. Following this initial inservice activity, the representatives engage in activities that help colleagues become thoroughly acquainted with IGE. Plans for implementing IGE are then operationalized. In this phase, external resource persons are often required to provide assistance.

4. Refinement. After being involved in implementing IGE for a period of time, agency staffs often need to review the basic concepts and practices of IGE. Often, they also find the need to acquire new skills and understandings in order to refine their implementation of IGE. In this phase, staff members engage in activities designed to meet these needs. A result of these efforts is that a wide range of skills and competencies begins to develop among the staff members.

5. Renewal. Built into the system of IGE are the means for the individuals and agencies cooperating in the implementation of IGE to: (1) identify and resolve unanticipated problems; (2) develop improved ways of implementing the concepts of IGE; and (3) prepare successive generations of personnel to fill IGE roles in the various agencies. These conditions can be realized when state IGE networks become fully functional, with agencies assuming their appropriate roles.

This model is applied to each of the major kinds of agencies implementing IGE. The operational characteristics of these phases for personnel from the agencies tend to vary. The application of these phases to local education agencies will demonstrate the kinds of practical concerns in each of the phases. At the local school district level, the chief school officer, selected central office staff such as the director of elementary education, and building principals are involved in the awareness phase.[5] (Figure 4 is a chart describing a

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[5] This description of the operational characteristics of the phases for local education agencies and the referenced agendas in the appendices fulfills the requirements of a report describing: (1) the one-day awareness conferences for superintendents and decision makers, and (2) the three-day conferences for building principals and unit leaders as per

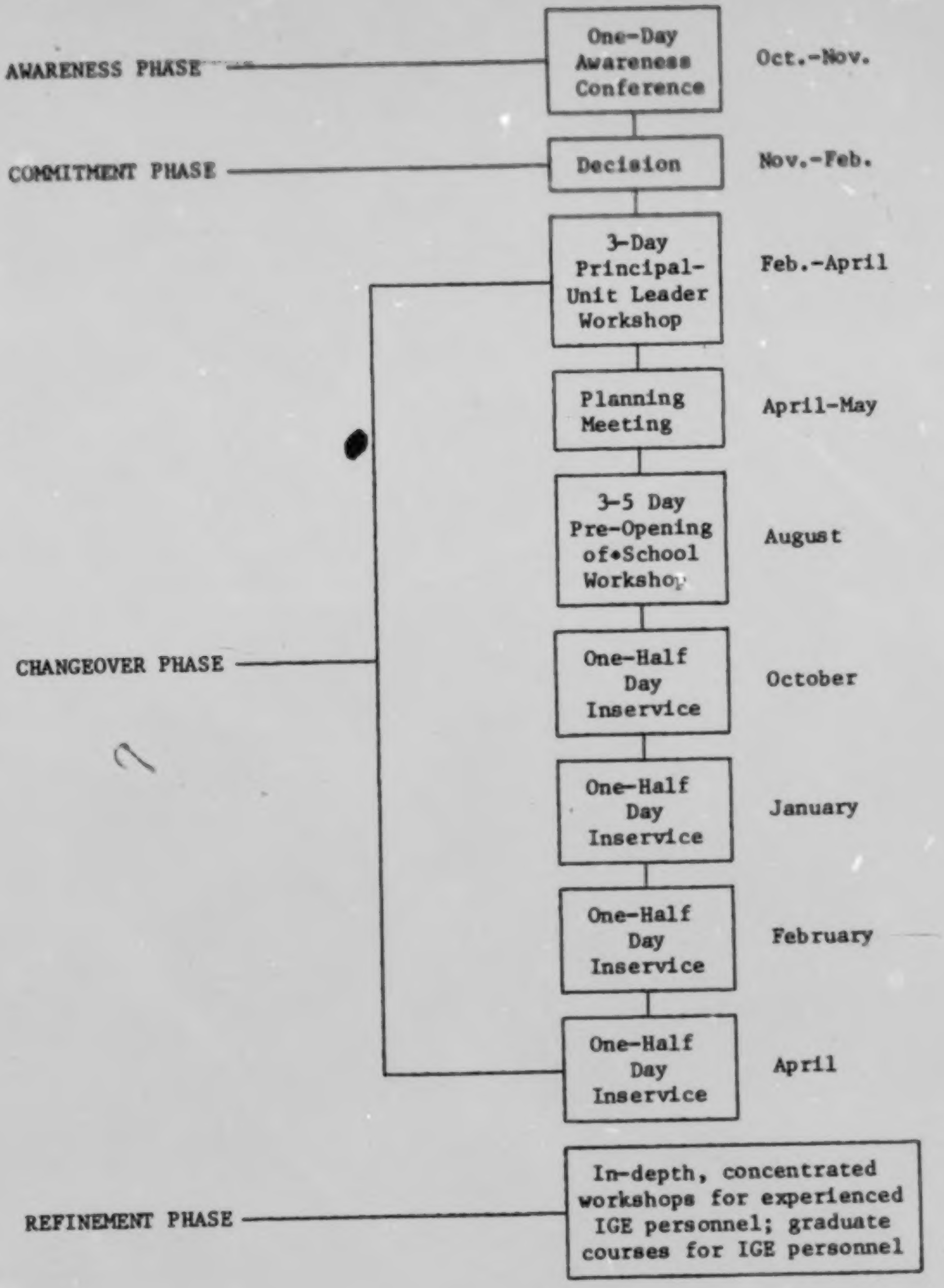
AWARENESS PHASE
One-Day Awareness Conference
Oct.-Nov.
COMMITMENT PHASE
Decision
Nov.-Feb.
3-Day Principal-Unit Leader Workshop
Feb.-April
Planning Meeting
April-May
3-5 Day Pre-Opening of School Workshop
August
CHANGEOVER PHASE
One-Half Day Inservice
October
One-Half Day Inservice
January
One-Half Day Inservice
February
One-Half Day Inservice
April
REFINEMENT PHASE
In-depth, concentrated workshops for experienced IGE personnel; graduate courses for IGE personnel

Figure 4. Prototypic sequence of inservice activities for local school districts.

Based on Klausmeier, Walter, and Lins, Manual for Starting and Maintaining State IGE Networks, Madison: UW/SRF IGE Teacher Education Project, 1974.

prototypic sequence of activities in the first four phases as they apply to local schools.) In addition to what they may have read about IGE in professional journals or heard at professional conferences or from colleagues, they may receive specially targeted communications from either the state education agency or an implementation agency such as an intermediate education agency or a teacher education institution. The communication may include a brochure and an invitation to a one-day awareness conference to be held in their vicinity. (A prototypic awareness conference agenda is in Appendix A.) Very often, school districts will also send representative teachers, school board members, and/or community representatives to such conferences. The objective of the conference is to give school personnel enough information about IGE so that they and those in their school district can make a decision about whether or not to adopt IGE. Generally, awareness conferences are held in October and November of each year.

During the commitment phase, those persons attending the one-day awareness conference engage in activities to secure the support and approval of other persons in the school district. The building principals present information and hold discussions with their building staffs, attempting to secure a favorable consensus. The superintendent and other central office staff present information to community groups and the school board and obtain official action. This phase normally requires from November to February to be completed.

Once a favorable decision is determined and the schools that intend to change over to IGE are identified, the principals and prospective unit leaders are sent to a three-day (or longer) principal and unit leader workshop. In this workshop, which begins the changeover phase and is normally held in February to April, the participants acquire the necessary understandings and skills relative to the concepts and practices of IGE. When the participants leave the workshop, they have prepared a plan for providing inservice activities to the balance of their school staffs. Upon returning to their schools, the principals and unit leaders hold planning meetings and begin to involve the rest of their building staffs. These meetings occur during April and May. During August preceding the opening of school, the principals and unit leaders conduct a total staff workshop for three to five days, similar to the workshop they attended. Some schools hold this workshop during the summer months and add an additional week for in-depth planning. (Prototypic agendas for the Principal-Unit Leader Workshop and the pre-opening of school workshop are in Appendix A.) During the first year that a school is an IGE school, each staff member should spend a minimum of four half-days in inservice activities

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item "h" of A Proposal to Support the Completion of Modification #16 to Contract #OE-5-10-154, submitted to NIE in March 1973. The Center's request to delay the submission of such a report and incorporate it into this report was approved by NIE.

to review basic concepts and practices in order to evaluate the progress of implementation.

At the end of the first year of changeover to IGE, school staffs and central office personnel evaluate the first year of implementation and assess both the basic concepts and practices of IGE that need to be reinforced and the additional skills and understandings that are required to refine their implementation of IGE. The school has now entered the refinement phase. The IIC and the SPC jointly discuss these needs and plan appropriate staff development activities to assure that the needs are met. Depending on the size and sophistication of the district, the persons who can conduct the inservice may be in the school district. Early in the refinement phase, schools tend to be either totally independent of other agencies or totally dependent upon other agencies. As they participate more fully in activities in a state IGE network, they grow to a more realistic comprehension of when to seek outside help and when to resolve their own problems. When they begin to think about such considerations, they are entering the renewal phase.

Implicit in this discussion is the fact that some person, properly trained as an IGE implementor, from the state education agency, intermediate education agency, and/or teacher education institution has been working with the school district and that the school district is a member of an RICC. Such a person participates in conducting the awareness activities, provides expert assistance during the commitment phase activities, conducts the changeover phase activities, and assists in evaluating the first year of operations. The implementor and the agency he represents are also resources for refinement and renewal phase activities.

Considerations in Implementing IGE

One set of considerations is related to the nature and characteristics of IGE. IGE is a relatively complex set of concepts and basic principles which require substantial changes in the behaviors of persons involved in its implementation. The matter of new behaviors on the part of individuals implementing IGE is approached through redefining roles and providing the essential understandings and skills to fulfill the redefined roles. IGE is not comprised totally of new concepts, however; many of its ideas are familiar. Therefore while the changes in roles may be threatening to some, the familiarity of many of the ideas makes IGE acceptable to most educators.

IGE is also an open system that can easily be adapted to local circumstances, and it is divisible; for example, some of the components can be adopted initially, with other components added at a later time. The implementation of IGE can be handled flexibly and can progress at a comfortable pace.

These characteristics of IGE suggested to the R & D Center that they adopt certain approaches to designing inservice activities and materials. First, the Center has developed and is continuing to develop prototypes for the various components of IGE. These prototypes are described explicitly so that adopters can anticipate some of the consequences of modifications and can make appropriate allowances for such consequences as they adapt the prototypes to local circumstances. Second, inservice activities and materials are designed to provide enough information and experiences to help individuals make a successful changeover to IGE. Third, the skills and understandings required for successful implementation of IGE are learned through activities and materials which focus primarily on those aspects of IGE that are unique to IGE or essential to its successful operation. The basic concepts are explained and then illustrated with examples of excellent IGE practices. By such approaches, only a minimal investment of time and money is required for participation in inservice activities.

A fourth approach adopted by the R & D Center reflects a desire to achieve both quality of implementation and rapid implementation in large numbers of agencies. The quality of implementation was accounted for in designing inservice activities and materials as described above. However, because of limited monetary and human resources, and the fact that funding for implementation has been awarded on a relatively short-term basis, the R & D Center does not attempt to engage in such activities as "market analysis" or identification of early adopters. Instead, implementation proceeds by the Center's broadly disseminating information and then providing inservice to those schools and agencies which choose to implement IGE. Agencies are given opportunities to learn the minimally required skills and understandings for the successful changeover to IGE and, at the same time, the R & D Center cooperates with other agencies in developing an IGE support system so that agencies can continue to be successful.

The IGE Support System

The R & D Center and the UW/SRF Project are cooperating with agencies in developing facilitative environments as one of the major components of IGE. The primary function of these facilitative environments is to provide an IGE support system in which the agencies implementing IGE can continue to be successful. It has been predicated from experience, which has shown that workshops alone are not sufficient, that there needs to be a continuing cooperative relationship between the users and sources of assistance. The IGE support system is comprised of four basic components: (1) the Association for Individually Guided Education; (2) leadership development activities sponsored by the R & D Center, the UW/SRF Project, and other cooperating agencies; (3) multistate IGE institutes; and (4) state IGE networks.

To function effectively, the IGE support system had to be formally organized with agency roles clearly defined, plans formulated, and communication channels between agencies and levels clearly understood. In this way, the system could develop a problem-solving capability drawing upon multiple resources and perspectives.

Clearly, a support system requires formally establishing linkages among agencies and groups of educators. The R & D Center decided early in IGE planning that the implementation of IGE should primarily involve those agencies which have a legal responsibility and are accountable for certain specified functions in education. These include the state education agency, teacher education institutions, local school districts, and, in some states, intermediate education agencies. In addition to these agencies, other groups such as legislatures, community groups, and professional organizations have substantial interest in and influence on educational matters. There is no question that these groups should at least be informed about IGE, and in cases such as community groups, be involved in its implementation. The Center, however, has tried to involve primarily those agencies with legally appointed functions and with the expertise and resources needed to carry out those functions. For this reason, state IGE networks and other facilitative arrangements involve, at a minimum, state education agencies, teacher education institutions, and local schools, including community representatives. Following is a brief discussion of each of the support system components.

The Association for Individually Guided Education, Inc., established in June 1973, is the national component of the IGE support system. It brings together all the kinds of agencies that are implementing IGE in the nation. Its annual national conference, proposed newsletters, and clearinghouse provide a forum for: (1) sharing and communicating the ways in which unanticipated problems have been identified and resolved, and in which the concepts of IGE have been implemented in a variety of settings; and (2) demonstrating how a variety of agencies can work together in mutually satisfying ways. Its governing body, the Council of Representatives, demonstrates how local, intermediate, and state educational agencies, and teacher education institutions can jointly participate in governing a national professional association. The Council of Representatives is comprised of representatives from three divisions. The largest is the State IGE Network Division, in which each state IGE network has representatives from state, intermediate, and local education agencies and teacher education institutions. Members from states that do not have IGE networks and representatives from educational research and development organizations comprise the two other divisions. The R & D Center and the UW/SRF Project are also represented.

Another component of the IGE support system is a series of leadership development activities. These are designed to increase the skills and understandings of experienced IGE leaders in each state and to prepare additional leaders. The focus of the activities is twofold: (1) to help state network personnel develop functional networks; and (2) to develop additional human resources that can assist other agencies. Leadership development activities are conducted by the R & D Center, the UW/SRF Project, cooperating agencies within the states, and /I/D/E/A/. As multistate IGE institutes are established, they will have a key role in providing such leadership development activities.

The concept of regional multistate IGE institutes emerged in mid-1974 as a component of the IGE support system. Such centers are located in teacher education institutions and serve to develop programs in response to the needs of other IGE agencies in surrounding states. Teacher education institutions have situational factors that allow them to cross state boundaries and to allocate human resources flexibly. They also have intellectual resources often not available in other types of agencies. In addition to providing consulting services, regional IGE centers conduct leadership workshops; develop, implement, and disseminate prototype modules, courses, and programs for IGE in teacher education institutions; and assist in the implementation of the IGE teacher education materials that are being developed by the UW/SRF Project. As the capabilities of the agencies in the various states within the regions become more sophisticated, the role of the IGE institutes probably will change. To assure that IGE institutes exercise leadership and are responsive to and reflective of the status of IGE implementation in their respective regions, each institute will have an advisory committee comprised of representatives of the states in that region.

The statewide component of the IGE support system is the state IGE network (Klausmeier, Walter, & Lins, 1974). It consists of agencies within the state that provide assistance to both schools making the changeover to IGE and existing IGE schools, and to agencies within the state that are developing programs for preparing educators to fill roles in IGE.

The prototype state IGE network is comprised of the state education agency, intermediate education agencies (where appropriate), teacher education institutions, and local school districts organized at three levels--local, regional, and state. At each level, there is a formal organizational arrangement established whereby IGE personnel engage in solving problems. Representatives from one level are members of the next highest level. In this way, problems that are resolved at higher levels can be dealt with and resources can be linked. The three levels of the state IGE network are the Systemwide Program Committee (SPC) at the local district level, the Regional IGE Coordinating Council (RICC) at an intermediate level, and the State IGE Coordinating Council (SICC) at the state level.

The organization of the state IGE networks results in a chain of interlocking relationships spanning local, regional, and state agencies. No one agency or level in the state network can make important decisions without information from other agencies or levels. When fully functional, a state network provides a broad base of support for IGE and permits access to a wide variety of perspectives, resources, and skills essential for the continuing success of IGE in all agencies. In Chapter IV, the prototype of the state IGE network organization is described in detail.

Until these IGE support system components become self-sufficient both programmatically and fiscally, the R & D Center and the UW/SRF Project are the two major sources of input to the support system. Input concerns are related to the programmatic activities. In terms of the total dollar-value contribution of the various agencies, the direct monetary support provided by the R & D Center and the UW/SRF Project is very small, provided primarily to support "out-of-pocket" expenses as the agencies become involved in a new endeavor.

The R & D Center has three major sets of activities that give input to the IGE support system. One set of activities is the research and development products generated by the R & D Center, particularly curriculum and instructional materials. Another is the efforts of the Center's IGE Staff Development project, focusing on revising existing inservice activities and materials as well as developing new ones for assisting local schools in the awareness, commitment, changeover, and refinement phases. The third set of activities is carried out by the implementation staff of the Center. Some of the activities focus on helping agencies in the state develop functional networks through consultations, planning workshops, and providing technical assistance. The implementation staff also conducts leadership workshops for the various curriculum and instructional materials developed by the R & D Center, for the Multiunit School-Elementary, and for IGE teacher educators. Such workshops are designed to provide each state network with personnel resources to assist other agencies in implementing IGE. Finally, the implementation staff initiates the cooperative relationships for establishing the IGE institutes. The primary thrust of the R & D Center in these activities is to provide input for local schools, state education agencies, and IGE institutes, with a secondary thrust related to teacher education institutions.

The UW/SRF Project provides the major input to the IGE support system in relation to teacher education concerns; it also provides direct monetary support to state IGE networks. The primary developmental activity of the UW/SRF Project is to produce multimedia materials to be used by students and professors in teacher education institutions. With these materials, teacher education institutions will be able to introduce IGE concepts and practices into undergraduate and graduate programs. In making IGE available to prospective teachers, unit leaders, and principals, some teacher education institutions will design competency or performance-based programs, others will design specific IGE courses, and still others will introduce IGE into already existing courses.

The IGE support system is emerging in cooperation with a number of agencies in 23 states. At varying levels of commitment and expertise, state education agencies, teacher education institutions, local school districts, and, where appropriate, intermediate education agencies are cooperatively establishing formal relationships and designing programs. The purposes of these efforts are to help school staffs make the changeover to IGE, to assist continuing IGE schools, to prepare professional educators for roles in IGE, and to improve teacher education programs. All of these efforts are linked nationally, regionally, and statewide.

Theoretical Foundations and the Validation of the IGE Implementation Strategies

Most of the theory and research on implementation is found in the literature on change, organizational theory, and communications. Many typologies have been formulated which are illuminating for implementation; yet, there is no one systematic theory or model that encompasses the diversity of existing perspectives. The constructs and strategies developed for the implementation of IGE may come closer than any other similar set to establishing a model for implementation. In developing these, the R & D Center has utilized an eclectic approach to implementation, drawing upon four major perspectives (Paul, 1974). These are (1) social interaction; (2) problem solver; (3) research, development, and diffusion; and (4) linkage.

The creation of state IGE networks is based in part on the importance of interpersonal relations and peer-group support explicated in the social interaction perspective. Two major ingredients of the problem-solver perspective are staff capabilities and problem explication. As indicated earlier, IGE inservice activities and materials and leadership development efforts focus on staff development designed to help personnel function in new roles and learn behaviors needed to solve problems. The interorganizational relationships established and maintained by the R & D Center with state education agencies, teacher education institutions, and local school districts for the transmission of IGE reflect a major characteristic of the R & D perspective--the orderly translation of R & D results into practice. Finally, the R & D Center's implementation strategy emphasizes the maintenance of productive relationships between users of IGE and sources of assistance. Such relationships are stressed in the linkage perspective.

Recent research on innovation lends empirical support to the R & D Center's approach to the implementation of IGE, particularly to the development of a support system. A recent report (Baldridge, 1974) strongly suggests that a complex organization with a heterogeneous environment facilitates innovation. The IGE support system is large and complex in its national scope and differentiation of functions among cooperating agencies and groups. With the involvement of a variety of types of agencies, the IGE support system also provides a heterogeneous environment for IGE. The same research report also states that "unless innovations are structurally, financially, and politically supported . . . they are likely to fail." The creation of the IGE support system makes it possible for IGE to obtain all three kinds of support.

A study conducted by Educational Testing Services gathered evidence relative to the efficacy of the Center's strategies to date: "All evidence points toward the conclusion that [the MUS-E] organizational and instructional changes have taken hold in the majority of schools . . . [Ironside, 1973]." The same report noted that:

> the follow-up study verifies the admonition that IGE/MUS-E implementation may take three to four years (in terms of local satisfaction and in terms of fulfilling the many implementation criteria). Some school people, researchers, and coordinators have perhaps hoped that the major hurdles could be mastered in the first year by most schools; this appears a questionable assumption at best, in view of the data reported here.

Another study found that "technical assistance is needed to militate against ending the implementation process too soon and to revitalize, support, and encourage the staff [Packard, 1973]." A third study focusing on linkage arrangements found that "a proper mix of training activities carried out on a frequent basis produced optimum linkage. Teacher education institutions, acting as mediating organizations . . . exhibited high linkage [Paul, 1974]." A fourth study, discussing in part the nature of relations between R & D organizations and field users, described the Wisconsin R & D Center's model as "having a high payoff [Baldridge & Johnson, 1972]."

These findings lend support to the Center's implementation efforts. They show that the strategies are in fact helping schools make a successful changeover to IGE. They also show, however, that implementation of IGE is a long-term process and needs a continuing support system.

IV

STATE IGE NETWORKS, 1971-74

This chapter focuses on the growth and development of state IGE networks from 1971 to 1974. It is divided into four sections: (1) history of relations with states; (2) the prototype state IGE network; (3) a descriptive status report as of September 30, 1974 and activities during the preceding year; and (4) future directions.

History of Relations with States

Since the R & D Center's first funding in 1964, it has made a practice of working cooperatively with representatives of the Department of Public Instruction (DPI), local school districts, and teacher education institutions in Wisconsin. A liaison committee was established early with the DPI, and the R & D Center paid half the salary of a DPI staff member who served as liaison between the R & D Center and the DPI. A school advisory committee was established shortly after the Center was funded. In 1968, the DPI and the R & D Center entered into agreements with four Wisconsin teacher education institutions to establish a lighthouse, or demonstration, project to determine the acceptance of IGE in local schools and the feasibility of involving teacher education institutions in helping schools make the changeover to IGE, and to provide assistance on a continuous basis. IGE was found to be acceptable, and results showed that teacher education institutions could assume important roles in IGE implementation.

It was out of these cooperative relationships that the total system of IGE was formulated. The combined input of the DPI, local schools, teacher educators, and R & D Center staff had three results; (1) the identification of both the least desirable characteristics and the beneficial outcomes of the age-graded, self-contained form of schooling; (2) the synthesizing of these concerns and relevant research and theory into the system of IGE; and (3) the construction of the basic framework for the implementation of IGE. These results were described in Chapter III, but the impact of the third result on the development and activities of state IGE networks is highlighted in this chapter.

Establishing relationships with and among the agencies legally responsible for certain educational functions proved successful in Wisconsin. From the fall of 1968 until the 1974-75 school year, 14 percent of the elementary buildings of the state and 25 percent of Wisconsin school districts had implemented IGE. Eight teacher education institutions had become involved formally in working with local schools, and the concepts and practices of IGE were being taught in these institutions. The State Superintendent of Public Instruction had publicly endorsed IGE as an alternative form of schooling. The DPI assumed a vital leadership role, assigning one full-time person to coordinate the statewide implementation effort, and a state IGE network was initiated in the fall of 1973.

When, in early 1971, DHEW and USOE designated the MUS-E for funding for national implementation, the previous years' experiences in working in Wisconsin provided the R & D Center with the basis for similar activities in other states. With the funding provided in 1971 and 1972 by the National Center for Educational Communications, the Bureau for Professional Educational Development, and the National Center for Educational Research and Development of the USOE, the R & D Center entered into subcontractual relationships with state education agencies in nine states and a teacher education institution in one state (California), for a total of 10 states.[6] Informal relations were also established with local school districts in Lincoln, Nebraska; Fairfax County, Virginia; the Merrimack Education Center in Chelmsford, Massachusetts; and the State University College at Fredonia, New York. Technical assistance, but no monetary support, was provided to these sites.

Prior to this funding, however, a small contract of $30,000 (Walter & Horn, 1972) was awarded the R & D Center by USOE's National Center for Educational Communications. The objective of the contract was to conduct a national effort to disseminate information about IGE. The efforts consisted of a two-stage, direct-mail effort followed by five regional one-day awareness conferences. Out of these conferences came the basis of interest for the subsequent implementation efforts in the 10 states.

The program plans and budget requests submitted by the R & D Center to USOE for the implementation funds were presented with two major considerations. First, implementation would be carried out in terms of a specific model of implementation consisting of four phases: awareness, first-year installation, maintenance, and refinement/institutionalization. This model, as indicated in Chapter III, has been refined into five phases. Second, the agencies legally responsible for education in each of the states would be involved in the efforts. Thus, state education agencies were primarily responsible for helping schools make the changeover to IGE, and selected teacher education institutions were responsible for conducting institutes and developing academic-year, graduate-level programs for experienced IGE personnel, primarily principals, unit leaders, and reading staff teachers.

Parenthetically, it should be noted that the first program plan from the R & D Center requested three years of support for awareness and other changeover activities and five years for refinement institutes and academic-year programs. However, USOE supported only two years of changeover and refinement institute efforts and one year of academic-year program development. The refinement institutes and academic-year efforts, however, resulted in the published descriptions of programs which are useful to other teacher education institutions (Klausmeier & Fruth, 1973; Klausmeier, 1973).

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[6] California, Colorado, Connecticut, Illinois, Indiana, Minnesota, New Jersey, Ohio, South Carolina, and Wisconsin.

The funds[7] awarded by USOE in 1971 and 1972 were utilized in three major ways. First, a staff of persons knowledgeable about IGE was employed by the Center to coordinate the national effort and to carry out conferences and workshops to assist local schools in making the changeover to IGE until such time as qualified implementors could be prepared in each of the states. Second, subcontracts were executed with nine state education agencies and one teacher education institution to coordinate the within-state efforts in assisting schools in the changeover to IGE. In each of the 10 states, the funds made available through the subcontracts were based on the projection that a specified number of schools would implement IGE. The prototype subcontract assumed that for $20,000, a minimum of 20 IGE schools would be implemented each year (see Appendix B for a copy of the subcontracts). Table I shows the number of schools implementing IGE in 1971-72, 1972-73, and 1973-74.

Funds were also expended through subcontracts with teacher education institutions. Seven teacher education institutions conducted advanced institutes for reading staff teachers, unit leaders, and building principals. Three teacher education institutions conducted academic-year programs to prepare persons to be Wisconsin Design for Reading Skill Development coordinators, unit leaders, and IGE principals. Table II indicates the institutions and the number of participants involved.

Implementation efforts during the 1971-72 and 1972-73 years did not involve any attempts to form and establish state IGE networks. Activities were carried out primarily with state and local education agencies. It became apparent during this period, however, that as the number of IGE schools grew, there would have to be new arrangements to be responsive to the needs of schools. The state education agency alone could not be expected to devote increasingly more resources to IGE schools. Thus, both the increasing number of schools and the limitations of state education agency staff resulted in the conceptualization of a state IGE network in mid-1973 (Klausmeier, Walter, & Lins, 1974).

A number of factors led to activities to bring about the greater involvement of teacher education institutions in 1973. Up to that time, the efforts of the R & D Center had focused primarily on working closely with seven teacher education institutions. The lack of greater involvement in teacher education was due in part to the fact that the R & D Center was never funded for such efforts, since two other R & D centers have a teacher education focus. The experiences with the seven cooperating institutions, however, provided valuable information for

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[7] Over the two-year period, the funds were allocated in the following way: for R & D Center staff salaries, travel (staff and consultants), consultant honoraria, and management, $218,050; subcontracts with states, $235,000; state coordinator training, $46,050; one-week institutes, $72,000; and academic-year programs, $70,500, for a total per year of $641,600, or $1,283,200 for the two-year period.

TABLE I

IMPLEMENTATION OF IGE IN 14 STATES
1971-72 to 1973-74

State	1971-72	1972-73	1973-74	Totals
California	22	26	27	75
Colorado[3]	30	33	2	65
Connecticut	23	30	13	66
Illinois[3]	54	40	9	103
Indiana[3]	22	21	12	55
*Massachusetts[1,2]	NA	21	18	39
Minnesota[3]	20	24	6	50
Nebraska	7	7	0	14
New Jersey[3]	20	40	10	70
New York[1,2]	NA	15	5	20
Ohio[3]	21	64	26	111
*Rhode Island[1,2]	NA	12	1	13
South Carolina[3]	20	26	3	49
*South Dakota[1,2,3]	NA	10	17	27
*Texas[1,2,3]	NA	84	18	102
Virginia[1,2]	NA	15	5	20
Wisconsin[3]	50	160	24	234
Subtotals	289	628	196	1113
Pre-1971-72 Schools				164
TOTAL				1277

*UW/SRF States.

[1] There is no record of the 1971-72 and 1972-73 breakdown for these states; totals were combined into the 1972-73 column.

[2] Total as of 1972-73; no previous year's breakdown available.

[3] States with integral state education agency involvement.

TABLE II

ATTENDANCE AT 1971-72 AND 72-73 INSTITUTES AND 1971-72 ACADEMIC-YEAR PROGRAMS

PROGRAMS / INSTITUTION	UW-Madison	UW-Eau Claire	UW-La Crosse	Marquette Univ.	Univ. of Hartford	Univ. of Toledo	UW-Milwaukee	Totals
One-Week Advanced Leadership Institutes for Experienced Unit Leaders	174	206	100	104	42	100		726
One-Week Advanced Leadership Institutes for Experienced IGE Principals	193						106	299
One-Week Advanced Leadership Workshops for Reading Staff Teachers	528*							528
Academic-Year Program for Prospective Unit Leaders	9	10		5				24
Academic-Year Program for Prospective Principals	9							9
Academic-Year Program for Prospective Reading Staff Teachers	5							5
Totals	918	216	100	109	42	100	106	1591

*85 of these were in one (1) one-week institute; 443 attended one-day workshops conducted around the nation.

future efforts. Moreover, the move toward competency or performance-based teacher education, increased field-based experiences in addition to the conventional student teaching activities, and, in the face of declining enrollments, the continuing education of already certificated professionals are national trends that make IGE an attractive alternative to teacher educators. Another factor that elicits the interest of teacher education administrators is the increasing number of IGE schools, the staffs of which are demanding more consideration from nearby institutions. The R & D Center staff also concluded that teacher education institutions were the only agencies that could adequately prepare personnel for filling the various roles in IGE. That this was the time to involve teacher education institutions was indicated by the attendance at a national IGE teacher education conference held in Madison in January 1973; 83 persons represented 43 teacher education institutions in 18 states. At this conference, a national IGE teacher education consortium was organized. The role of this consortium will be explained later.

By early 1973, the R & D Center was cooperating with agencies in 10 states. At this time, however, the Center was notified that NIE did not plan to provide funds for dissemination and implementation activities. Consequently, the Center had to inform the various states that they were not to be provided with a third year of funding to help schools make the changeover to IGE.

Late 1972 to early 1973 was a crucial time in the national implementation of IGE. Representatives from the various states were expecting a third year of funding for the 1973-74 school year based on informal assurances from USOE. There were both a need and an opportunity to begin involving greater numbers of teacher education institutions in each state, but there were neither specific materials for teacher education courses and programs nor a likelihood of funds to begin such activities. There was also a need for state IGE networks to be developed as a component of the IGE support system. It appeared that the momentum generated during two years of national implementation was to be prematurely terminated. In fact, the representatives from the states made no plans to assist new schools in adopting IGE beginning in the fall of 1973. Efforts were to be devoted primarily to helping existing schools.

Three significant events in 1973 served to assure the continued implementation of IGE at least until 1976. These were (1) the creation of a national professional association for persons involved in IGE; (2) the funding by The Sears-Roebuck Foundation for an IGE teacher education project; and (3) the funding by NIE for the third year of IGE implementation.

When state IGE coordinators were informed in February 1973 that there would be no third-year funding, they organized a committee to establish a national IGE organization. This group and the national consortium of IGE teacher educators met in the spring to consider how the two groups could join forces. Early in the summer, there was a national meeting of the two groups and representatives from the R & D Center and the UW/SRF Project. They formed interim governing arrangements and made plans for the first annual national IGE conference.

Out of these efforts the Association for Individually Guided Education, Inc. (AIGE) emerged as a national, nonprofit, tax-exempt professional association.

In February 1973, The Sears-Roebuck Foundation funded a proposal submitted by Professor Herbert J. Klausmeier through the University of Wisconsin-Madison School of Education. Fiscally and administratively independent of the R & D Center, the UW/SRF Project and the Center cooperate closely on implementation and other matters. The objectives for this project were described in Chapter II.

In June 1973, NIE informed the R & D Center that a grant of $136,000 would be awarded to the Center for a third year of national implementation of IGE (A Proposal to Continue the National Implementation of the Multiunit School-Elementary, 1973). The grant stipulated, however, that no new states could be added. Furthermore, due to funding limitations, the amount to be awarded the states would be substantially less than in previous years. The primary objectives of the grant were to establish state IGE networks in the 10 states already cooperating with the R & D Center and to conduct leadership workshops. (A discussion of leadership workshops is presented in Chapter V.) Thus, in 1973, the 10 initial states received funds from both the R & D Center and the UW/SRF Project. An additional 4 states,[8] funded by the UW/SRF Project only, were added, bringing the total number of states implementing a state IGE network to 14. Further implementation funds (Continuation of the Dissemination/Implementation of Individually Guided Education: An Alternative Form of Elementary Schooling, 1974) awarded to the R & D Center by NIE in June 1974 provided an opportunity to expand the number of states by 9,[9] bringing the total in late 1974 to 23 states, covering 60 to 70 percent of the nation's population.

Funds provided by the R & D Center to the 10 initial states in 1973 and to the 9 additional states in 1974 were substantially smaller than in previous years, as were the funds provided by the UW/SRF Project. Table III indicates the pattern of funding over the four years to the various states from both NIE and UW/SRF Project funds. As a result of these reduced funds the subcontracts executed in 1973 and 1974 (see copies in Appendix C) did not stipulate a requirement to implement new IGE schools. The subcontracts, however, did require the participating states to establish state IGE networks. Table I reflects the effects, in terms of new IGE start ups, of the change in the subcontracts from 1971 and 1972-1973 and of the information that no third-year funding would be available. Clearly, most state IGE coordinators focused their efforts on assisting continuing schools and establishing the state IGE networks.

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[8] Massachusetts, Rhode Island, South Dakota, and Texas.

[9] Florida, Kentucky, Michigan, Missouri, New Hampshire, New York, Pennsylvania, Utah, and Virginia.

TABLE III
DIRECT GRANTS TO STATES FOR IMPLEMENTING IGE, 1971-74

State	1971	1972	1973		1974		Totals
			R & D Center	UW/SRF Project	R & D Center	UW/SRF Project	
California	$ 20,000	$ 20,000	$5,000	$10,000	$ -0-	$5,000	$ 60,000
Colorado	24,000	20,000	5,000	5,000	-0-	5,000	59,000
Connecticut	20,000	24,000	5,000	5,000	-0-	5,000	59,000
Florida	-0-	-0-	-0-	-0-	7,500	-0-	7,500
Illinois	32,000	28,000	5,000	5,000	-0-	5,000	75,000
Indiana	20,000	28,000	5,000	5,000	-0-	5,000	63,000
Kentucky	-0-	-0-	-0-	-0-	3,750	-0-	3,750
Massachusetts	-0-	-0-	-0-	10,000	-0-	5,000	15,000
Michigan	-0-	-0-	-0-	-0-	3,750	-0-	3,750
Minnesota	24,000	20,000	5,000	5,000	-0-	5,000	59,000
Missouri	-0-	-0-	-0-	-0-	7,500	-0-	7,500
New Hampshire	-0-	-0-	-0-	-0-	3,750	-0-	3,750
New Jersey	20,000	28,000	5,000	5,000	-0-	5,000	63,000
New York	-0-	-0-	-0-	-0-	7,500	-0-	7,500
Ohio	20,000	20,000	5,000	5,000	-0-	5,000	55,000
Pennsylvania	-0-	-0-	-0-	-0-	3,750	-0-	3,750
Rhode Island	-0-	-0-	-0-	2,500	-0-	5,000	7,500
South Carolina	20,000	20,000	5,000	5,000	-0-	5,000	55,000
South Dakota	-0-	-0-	-0-	2,500	-0-	5,000	7,500
Texas	-0-	-0-	-0-	10,000	-0-	5,000	15,000
Utah	-0-	-0-	-0-	-0-	7,500	-0-	7,500
Virginia	-0-	-0-	-0-	-0-	7,500	-0-	7,500
Wisconsin	32,000	28,000	5,000	5,000	-0-	5,000	75,000
TOTALS	$232,000	$236,000	$130,000		$122,500		$720,500*

*Of the total, $150,000 was awarded by the UW/SRF Project and $570,500 was awarded by the R & D Center.

Beginning in 1974, with the addition of 9 new states, no direct grants to the 10 initial states, and 4 states under the auspices of the UW/SRF grant, the R & D Center began establishing relations with the 14 original states through nonlegal memoranda of agreement (see Appendix D). The purpose of these agreements is to clearly establish minimum expectations between the parties and to legitimize the provision of technical assistance to these states. This approach is in keeping with the philosophy of the R & D Center that state IGE networks should become self-sustaining within three to five years and that the conducting of workshops should be funded by state resources. The present judgment is that five years is more realistic than three years, particularly if the goal for the implementation of IGE in 10 percent of the schools and 25 percent of the districts is to be realized more quickly than would occur under conditions of normal diffusion rates. One could characterize the R & D Center's implementation strategy as an intervention strategy, designed to accelerate diffusion. Without a critical mass of schools and other agencies involved, IGE would likely become another innovation that "did not take."

The Prototype State IGE Network

For reasons described in Chapter III and earlier in this chapter, the R & D Center and the UW/SRF Project, in cooperation with the various states, developed a prototype state IGE network. The UW/SRF Project published a manual and a related filmstrip (Klausmeier, Walter, & Lins, 1974).

As a component of the IGE support system, the state IGE network provides a means whereby the agencies of a state may cooperatively engage in activities related to the five phases of the implementation model. It is doubtful that IGE could reach the renewal phase in a state if that state IGE network has not been formally established.

In each state, the need to organize educational agencies into a network and to identify the roles of the various agencies may be inferred from noting the increasing number of schools implementing IGE and from considering five related needs: (1) inservice education to help schools make the initial changeover to IGE; (2) inservice education to strengthen schools after the changeover has been made; (3) undergraduate teacher education to prepare teachers for IGE schools; (4) graduate programs to prepare unit leaders and IGE staff teachers; and (5) graduate programs to prepare building principals and other administrators for new and existing IGE schools. These needs are met as the responsible educational agencies and teacher education institutions work together to plan activities related to them. This, in turn, requires organizational arrangements and communication linkages among the various educational agencies and teacher education institutions. Generally, planning groups comprised of representatives from the participating agencies are needed to help either inservice or oncampus programs get started on a statewide basis.

Figure 5 shows the possible organizational arrangements within a state network. Three interlocking levels were designed: (1) a state IGE Coordinating Council (SICC); (2) Regional IGE Coordinating Councils (RICCs); and (3) Systemwide Policy Committees (SPCs). These arrangements within a state are intended to complete the links between the MUS-E at the local school level and the AIGE at the national level. The following discussion of the three levels begins with the local school district level.

The SPC is the local facilitative network wherein the IGE schools of a district are represented at the school-district level. In the SPC, the concerns, problems, and plans of the IGE schools in the district are presented, discussed, and evaluated, with maximum relevancy for the schools involved. In Figure 5, three SPCs are shown in each region. In practice, there must be at least one SPC in any region, but there may be many more than three. The number of SPCs in any region will vary according to conditions within the state and region, such as the kind of governmental units, the number and size of school districts, the area of the state and the school districts, and the density of the population. Issues which transcend local school district boundaries are addressed by the RICC.

The Regional IGE Coordinating Council (RICC) is defined as including the SPCs from a number of districts within a region of a state, the state education agency, and a teacher education institution. In the case of large urban decentralized school systems, the RICC may include only the representatives from each area of the district. Other agencies represented on the RICC include the state education agency, one or more intermediate education agencies (where appropriate), and one or more teacher education institutions. It appears reasonable to have represented on RICCs those teacher education institutions that provide inservice support to local schools, that assume responsibility for preservice IGE teacher education, or that provide graduate programs for unit leaders and building principals. In most cases, each teacher education institution will not have all these responsibilities. The RICC is the arena where concerns, problems, and plans at a regional level can be discussed and evaluated while maintaining relevancy for the agencies involved. The RICC provides a structural means for a decentralized approach to implementation and a resolution of problems and sharing of resources. This decentralized approach allows for discussion and resolution of problems and needs without sacrificing detail or clarity; it also reduces the work effort of any single agency. In the RICCs, however, issues are likely to arise that must be referred to the state level.

The SICC is composed of representatives from each of the kinds of agencies in the RICCs of the state. Representatives on the SICC are one or more members of the state education agency, including a full-time state IGE coordinator, a representative of the intermediate education agency of each RICC in states where appropriate, a representative of the teacher education institutions in each RICC, and a representative of the SPCs in each RICC. It seems appropriate for the state education agency to be represented on the SICC by a person responsible for elementary-secondary education, another responsible

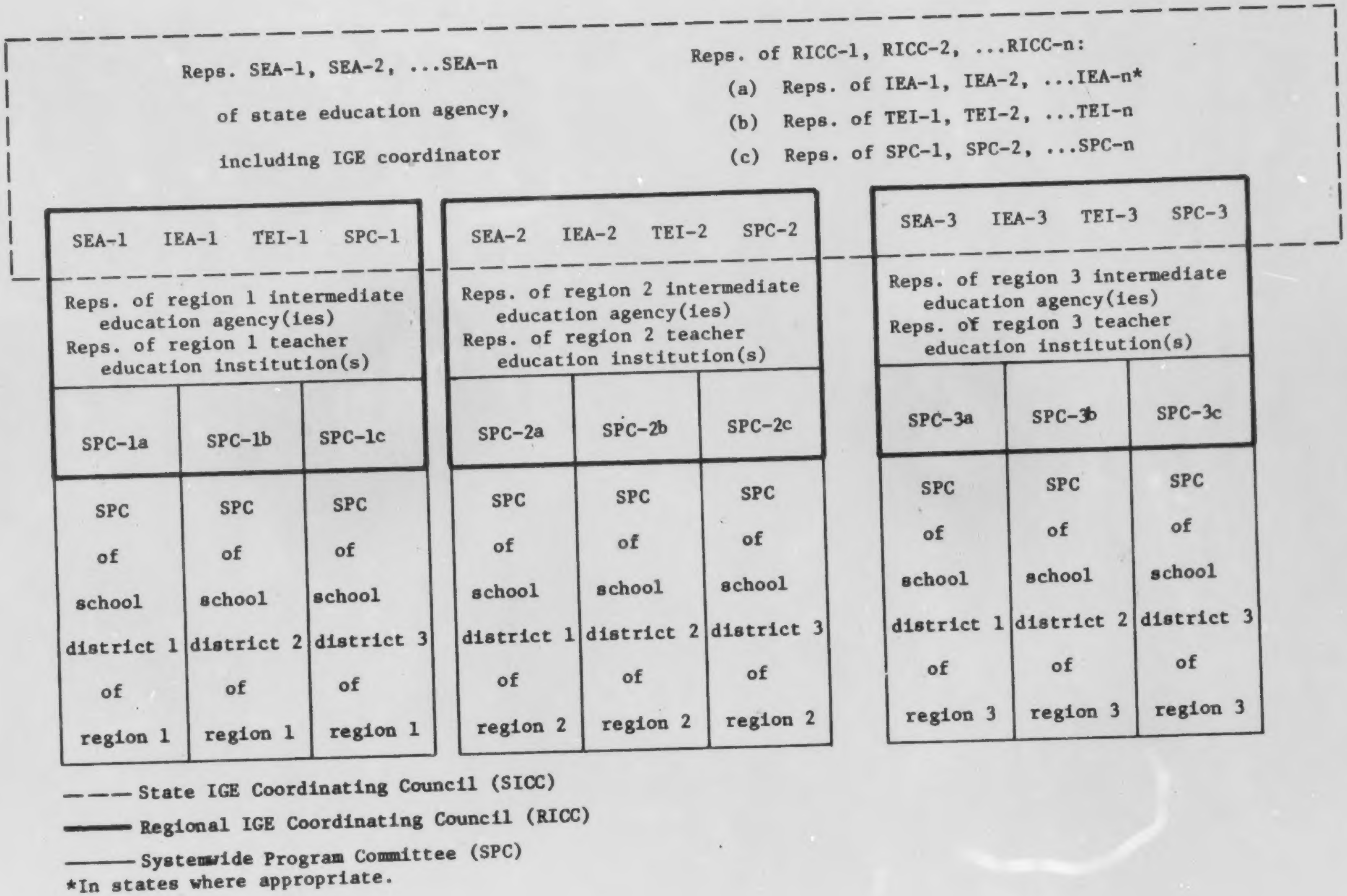
Reps. SEA-1, SEA-2, ...SEA-n
of state education agency,
including IGE coordinator
Reps. of RICC-1, RICC-2, ...RICC-n:
(a) Reps. of IEA-1, IEA-2, ...IEA-n*
(b) Reps. of TEI-1, TEI-2, ...TEI-n
(c) Reps. of SPC-1, SPC-2, ...SPC-n
SEA-1 IEA-1 TEI-1 SPC-1
Reps. of region 1 intermediate education agency(ies)
Reps. of region 1 teacher education institution(s)
SPC-1a
SPC-1b
SPC-1c
SPC of school district 1 of region 1
SPC of school district 2 of region 1
SPC of school district 3 of region 1
SEA-2 IEA-2 TEI-2 SPC-2
Reps. of region 2 intermediate education agency(ies)
Reps. of region 2 teacher education institution(s)
SPC-2a
SPC-2b
SPC-2c
SPC of school district 1 of region 2
SPC of school district 2 of region 2
SPC of school district 3 of region 2
SEA-3 IEA-3 TEI-3 SPC-3
Reps. of region 3 intermediate education agency(ies)
Reps. of region 3 teacher education institution(s)
SPC-3a
SPC-3b
SPC-3c
SPC of school district 1 of region 3
SPC of school district 2 of region 3
SPC of school district 3 of region 3
State IGE Coordinating Council (SICC)
Regional IGE Coordinating Council (RICC)
Systemwide Program Committee (SPC)
*In states where appropriate.

Figure 5. Prototypic organizational arrangements of a state IGE network.

Based on Klausmeier, Walter, and Lins, Manual for Starting and Maintaining State IGE Networks, Madison: University of Wisconsin/Sears-Roebuck IGE Teacher Education Project, February 1974.

for teacher education, and another responsible for innovation or program development, in addition to the state IGE coordinator. The members of the SICC address concerns, problems, and plans affecting two or more RICCs in the state. This interlocking membership provides a means for channeling to the SICC those regional concerns that have statewide overtones and, conversely, funneling to the RICC those statewide concerns that have regional implications. The SICC meets less frequently than do the RICCs, and it is more a body to coordinate and set directions for IGE matters than a body to actually implement IGE. In practice, some states may have only one state education agency representative on the SICC, but others may have many more. Similarly, some states may have few RICC representatives on the SICC, while others have many.

The number of individual members in the SICC and each RICC will necessarily vary within and among states. Each organizational unit should probably include representatives of each member agency as indicated in the prototype discussed earlier. When this results in a very large group, it may be appropriate to establish an executive committee.

If programs for assisting schools and for preparing personnel are to be formulated and executed, plans must be developed. To help state IGE networks conduct such planning, five broad outcomes have been devised:

1. Schools are given assistance to make the changeover to IGE.
2. Established IGE schools are provided inservice activities.
3. IGE concepts and practices are introduced into undergraduate programs to prepare prospective IGE teachers.
4. IGE graduate programs are planned, developed, and provided for unit leaders and staff teachers.
5. IGE graduate programs are planned, developed, and provided for building principals and other school administrators.

It is also important that the roles of the various agencies in the state IGE network be clearly understood. Role clarification contributes to reduction in conflict that may arise over program and territorial duplication. Most important, however, the identification of roles helps assure efficient and effective program execution.

Figure 6 shows the possible roles of member agencies of state IGE networks as they pertain to programs of inservice education, to oncampus undergraduate teacher education, and to oncampus graduate education. In many states, the roles of the various agencies in relation to these programs have not been clearly defined. The SICC takes the initiative in bringing personnel together to identify the responsibilities of the various member agencies.

GPO 810-033-6

Responsible Agency	ROLES			
	Awareness & Commitment: Mailings, 1-day conferences, and on-site assistance	Changeover: 3-day PUL workshop, 3-5-day workshop for IGE building staff, inservice during first year of implementation	Refinement: short, intensive noncredit and credit courses, graduate courses at school sites and on college campus	Renewal: preservice IGE teacher education program, graduate program for IGE unit leaders and staff teachers, graduate program for IGE building principals and other administrators
State education agency or regional agencies of SEA	1*	1	2	
Teacher education institution	2	2	1	1
Local education agency	3 (for its own schools)	3 (for its own schools)	3 (for its own schools)	

*1 indicates that the agency will probably take major initiative in most states; 2 indicates that the agency is less likely to take major initiative but should be involved in planning; and 3 indicates least likelihood for assuming primary responsibility for the function. There may be variations in roles within and among states.

Figure 6. Roles of the state education agency or intermediate education agency, teacher education institutions, and local education agencies in implementing IGE.

Based on Klausmeier, Walter, and Lins, Manual for Starting and Maintaining State IGE Networks, Madison: University of Wisconsin/Sears-Roebuck IGE Teacher Education Project, February 1974.

The organizational arrangements of the MUS-E have made possible excellent communicating capabilities in local schools. In turn, IGE has improved the quality of education for many children. On the basis of this experience and the organizational arrangement of AIGE, the prototype state IGE network pattern has been developed. It maintains the organizational-communication principles of the MUS-E in that decisions are made at the appropriate levels, and representatives from each level participate in at least one other level in the organization. This kind of organization is expected to facilitate participation by various educational agencies in the implementation of IGE.

The Status of State IGE Networks[10]

As of September 30, 1974 there were 14 state IGE networks in operation for one year. For the 1974-75 school year, funds were made available to add 9 more state networks, bringing the total to 23. Two means of collecting data were utilized: (1) the semiannual reports submitted to the UW/SRF Project, which met requirements of contracts with the R & D Center, were reviewed and synthesized, and (2) a telephone survey (Appendix E) was conducted to collect data not presented in the report. This section of Chapter IV is divided into two parts. The first part deals with the status of the organization of the state IGE networks; the second part describes the programmatic status.

Organizational Status. In terms of organization, the development of IGE networks among the states differs from the prototypic model. Since the model was introduced after 14 states had already been operating, some states have found it difficult to adapt their organizational arrangement to the model. As indicated in Figure 5, the State IGE Coordinating Council should have representatives from the state education agency, including a state IGE coordinator, and representatives from each Regional IGE Coordinating Council (intermediate education agencies, teacher education institutions, and Systemwide Program Committees). In all states, the various agencies are present. The states of Illinois and New Jersey will be used to illustrate the varied structural arrangement.

The Illinois IGE Network closely follows the prototype in its organizational alignments (see Figure 7). The State IGE Coordinating Council (SICC) is composed of representatives from the state education agency, the intermediate education agencies, teacher education institutions (public), and the Systemwide Program Committees. It also includes representatives from the Illinois Curriculum Council (an organization of members from such agencies as PTA, Jaycees, colleges and universities, elementary and secondary schools, junior

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[10] This part of the chapter represents a portion of the requirements for reporting the activities carried out under terms of Grant No. NE-G-00-3-0221.

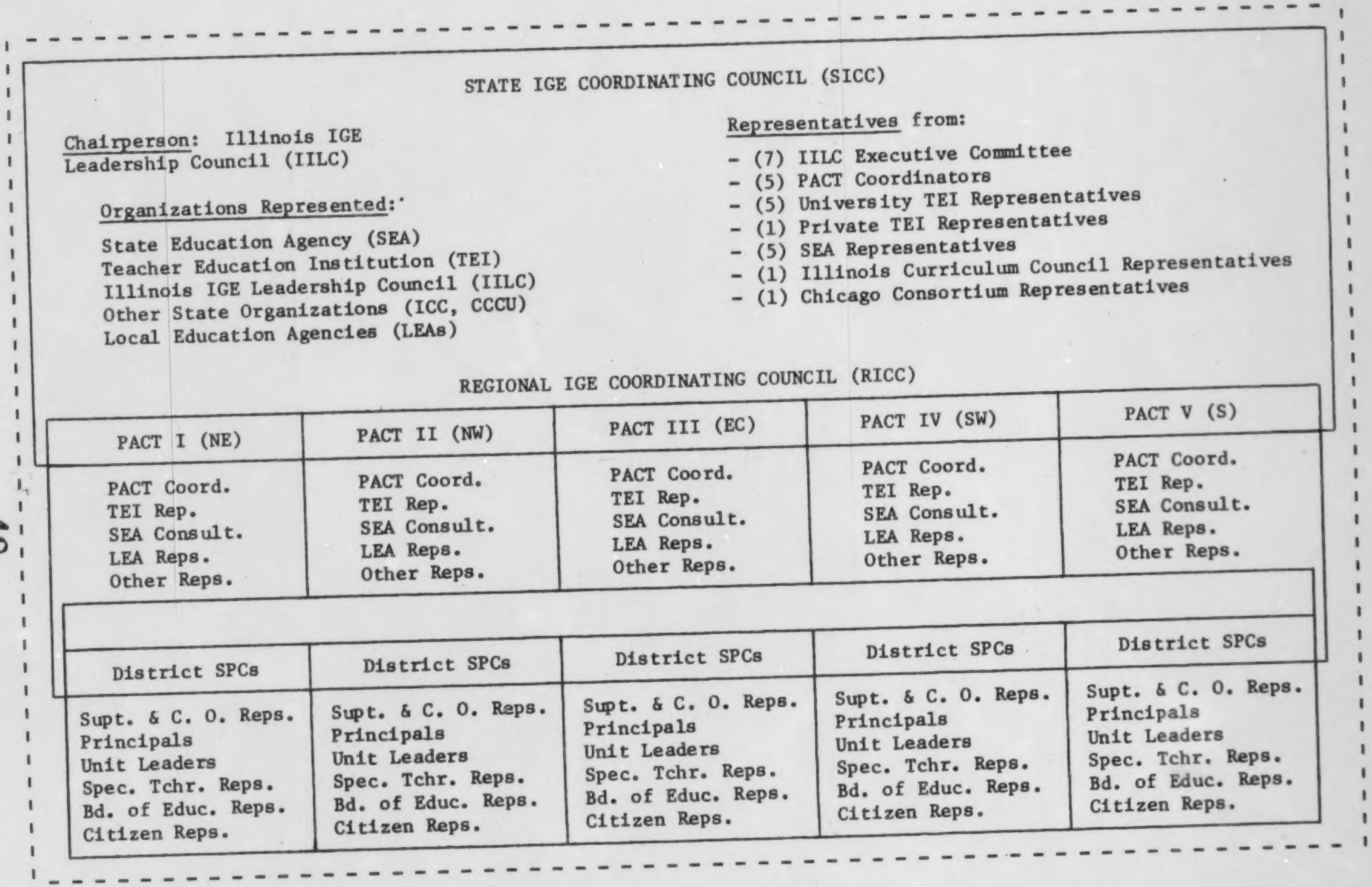
STATE IGE COORDINATING COUNCIL (SICC)
Chairperson: Illinois IGE Leadership Council (IILC)
Organizations Represented:
State Education Agency (SEA)
Teacher Education Institution (TEI)
Illinois IGE Leadership Council (IILC)
Other State Organizations (ICC, CCCU)
Local Education Agencies (LEAs)
Representatives from:
- (7) IILC Executive Committee
- (5) PACT Coordinators
- (5) University TEI Representatives
- (1) Private TEI Representatives
- (5) SEA Representatives
- (1) Illinois Curriculum Council Representatives
- (1) Chicago Consortium Representatives
REGIONAL IGE COORDINATING COUNCIL (RICC)
PACT I (NE)
PACT II (NW)
PACT III (EC)
PACT IV (SW)
PACT V (S)
PACT Coord.
TEI Rep.
SEA Consult.
LEA Reps.
Other Reps.
District SPCs
Supt. & C. O. Reps.
Principals
Unit Leaders
Spec. Tchr. Reps.
Bd. of Educ. Reps.
Citizen Reps.

Figure 7. Illinois IGE network.

colleges, and the State Board of Higher Education), a representative from private colleges and universities involved in teacher preparation, and the Chicago Consortium of Colleges and Universities.

The state of Illinois is divided into five geographic regions (North Central, Northwest, East Central, Southwest, and South). Regional IGE Coordinating Councils (RICCs) were formed to reflect the geographic regions of the PACT (Participation to Activate Change Today) System. Each PACT (RICC) has a coordinator and representatives from teacher education institutions, the state education agency, the Systemwide Program Committees, and other organizations. The Systemwide Program Committees have representatives from the superintendent's office, principals, unit leaders, boards of education, the community, and staff teachers.

In New Jersey, the organizational structure (Figure 8) of the SICC is very different from that of the prototypic model in Figure 5. The New Jersey SICC, or HUB, is composed of representatives of four leagues (RICCs). These leagues are Northwestern, Northeastern, Southern, and Central, and they include local education agencies, primarily the New Jersey State Departments of Education, and teacher education institutions. The New Jersey HUB has an Advisory Council whose membership represents the following agency affiliations: New Jersey Department of Education, New Jersey Association of School Administrators, New Jersey Department of Higher Education, New Jersey Federation of Teachers, New Careers in Education, New Jersey School Boards Association, New Jersey Education Association, the associations of the elementary and secondary school principals, New Jersey Congress of Parents and Teachers, and other representatives from the New Jersey Department of Education. Rather than having representatives from the State Education Agency and teacher education institutions on each of the regional leagues (RICCs), these are represented at the HUB level.

In the 14 states where networks are developing, organizational structure varies. Either SICCs or interim SICCs are operational. Since so many of these states were originally organized according to a league concept, some are finding it difficult to reorganize into a statewide network with basic representation at Regional IGE Coordinating Councils and State IGE Coordinating Councils of the state education agency, teacher education institutions, intermediate education agencies, and Systemwide Program Committees.

In California and Illinois, State IGE Coordinating Councils have developed to a stage where they are functioning more or less independently of the state education agency. In these states, the state agencies maintain their original roles of coordination and dissemination through an agency-appointed state IGE coordinator. Some of the functions formerly performed by the state education agency, for example, conducting awareness conferences and principal-unit leader workshops, have been taken over by the SICC.

In many states, Systemwide Program Committees (SPCs) are not assuming the roles and responsibilities outlined in implementation guidelines. Some districts or counties never formally organized SPCs. Some have indicated that since they had only one IGE school,

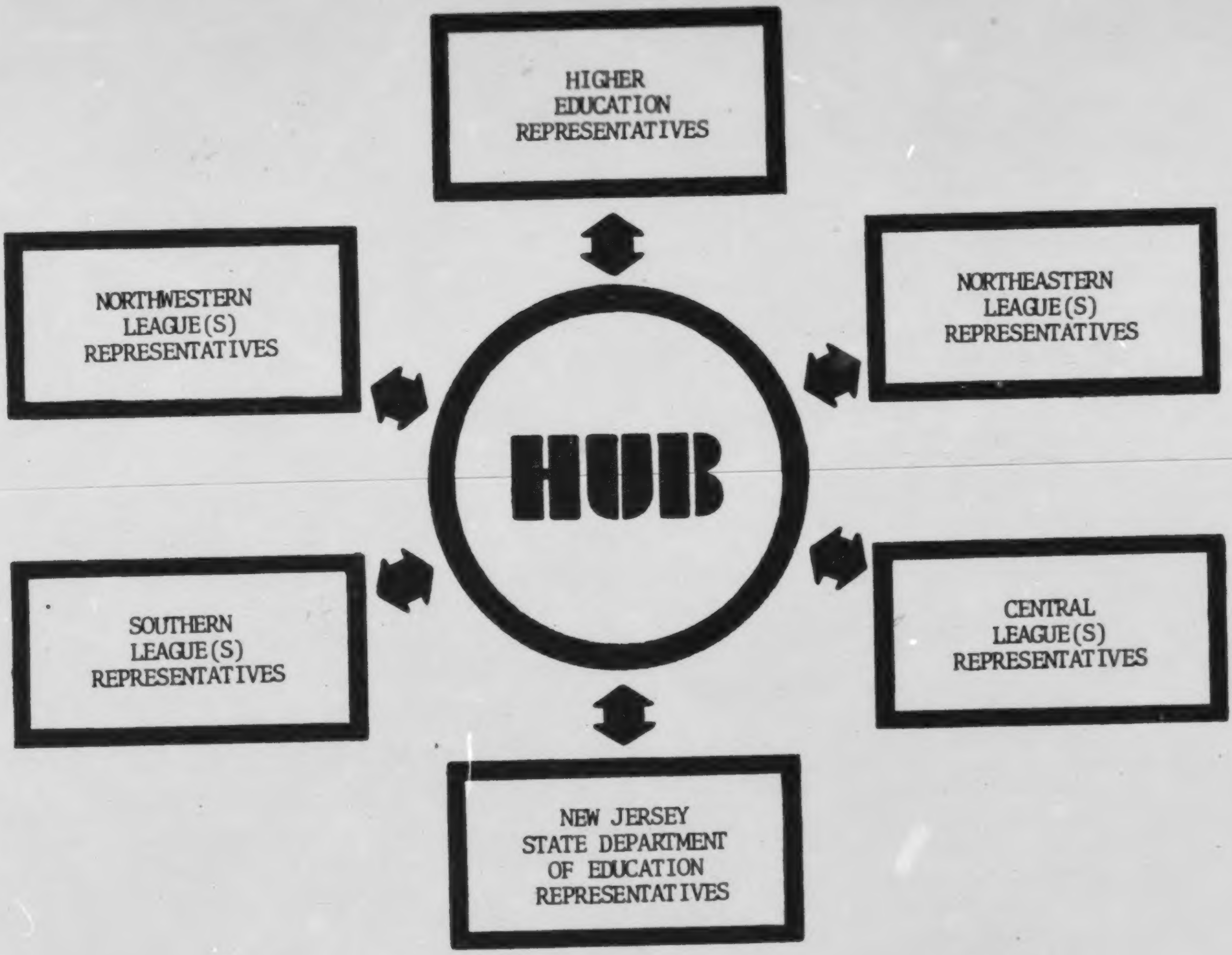
HIGHER EDUCATION REPRESENTATIVES
NORTHWESTERN LEAGUE(S) REPRESENTATIVES
NORTHEASTERN LEAGUE(S) REPRESENTATIVES
HUB
SOUTHERN LEAGUE(S) REPRESENTATIVES
CENTRAL LEAGUE(S) REPRESENTATIVES
NEW JERSEY STATE DEPARTMENT OF EDUCATION REPRESENTATIVES

Figure 8. New Jersey IGE network.

or their district was small and had only one elementary school, they did not see the rationale for a Systemwide Program Committee in their particular cases. Others felt that they did not have to add this component to their structure.

States having additional funds and integral involvement from the state department of education were found to implement more IGE schools and show more progress in their development (see Table I) than states with less state education agency involvement, when the size of the state is considered. There are full-time IGE coordinators in only 3 of the 14 states: Wisconsin, Colorado, and New Jersey. As the number of IGE schools grew, it became apparent that one-quarter- to one-half-time appointed state IGE coordinators needed additional assistance in order to perform effectively. Some other forms of assistance were sought from other sources.

In Wisconsin, assistance was found through greater involvement of teacher education institutions. The coordinator works closely with teacher education institutions in coordinating statewide IGE efforts. In eight public supported institutions, a staff member on the faculty was assigned to coordinate IGE activities (appointments usually were from one-quarter to one-half time).

In Colorado, the state IGE coordinator is also a full-time position. Along with the full-time coordinator, three staff members are on loan for one year from a local school district. This four-member team provides inservice activities for existing IGE schools as well as some staff-development activities for those schools desiring to implement IGE. At the end of the one-year term, these staff members return to their respective districts, and three others are selected to work with the state IGE coordinator.

In New Jersey, along with a state IGE coordinator, four staff members from the New Careers in Education Project work as IGE facilitators (implementors).

Most states have shown considerable progress in the development of either the SICCs or interim SICCs. They have been encouraged to include representatives from the state education agency, intermediate education agencies, teacher education institutions, and local education agencies on the SICC. In some states, the state IGE coordinator serves as chairperson of the SICC, but this is not always the case. SICCs hold periodic meetings on a regional basis to encourage broader participation.

In some states with functioning SICCs, the structure has been developed from the top. In most instances, local structures were initiated first and the SICC was developed next. Consequently, we find examples of developing SICCs and SPCs prior to the development of RICCs. One of the SICCs' major thrusts in the coming months is to pay particular attention to the growth and expansion of RICCs.

Programmatic Status. The implementation strategies in the 14 existing states of the IGE network revolve around the five outcomes for state IGE networks:

1. Assisting schools in making the changeover to IGE.
2. Providing inservice activities to established IGE schools.
3. Introducing IGE into undergraduate programs to prepare prospective IGE teachers.

4. Planning, developing, and providing IGE graduate programs for unit leaders and staff teachers.
5. Planning, developing, and providing IGE graduate programs for building principals and other school administrators.

In all 14 states, the first three outcomes are being realized: assistance is primarily being given to schools to make the changeover, to provide inservice activities for existing IGE schools, and to introduce or design specific IGE undergraduate courses in teacher preparation programs (see Table IV).

The state education agency, teacher education institutions, and the local education agency are fulfilling their roles (see Table IV) in the implementation of IGE: awareness and commitment, changeover, refinement, and renewal. Based on experiences in implementing IGE, it appears that either the state education agency or the intermediate education agencies usually provide for the inservice education of school personnel to get IGE schools started. They often utilize experienced IGE practitioners as consultants when conducting one-day awareness conferences, three-day principal-unit leader workshops, and other inservice activities. However, several teacher education institutions have been effective in starting IGE schools through providing the necessary inservice education. In large school districts, a person from the central office may provide this kind of inservice.

Experience has shown that staffs of IGE schools need inservice education during the first two years of changeover, or possibly longer. The staff development programs of most local schools cannot function effectively without some external support. Determining the necessary kind of continuing inservice activities requires working directly with the staff of the IGE schools four to eight times per year in sessions of one-half day or longer. Personnel from either the state education agency or intermediate education agencies perform the inservice education. In some cases, however, personnel of large local education agencies and teacher education institutions have assumed responsibility for this kind of intensive inservice education.

Primarily due to leadership workshops, an increasing number of teacher education institutions are providing both preservice and inservice training in their undergraduate and graduate programs. Appendix F contains a listing of examples of both credit and inservice courses in IGE that have been offered during the past two years.[11] As more teacher educators become knowledgeable about IGE principles and concepts, it is expected that more courses will be offered. Also, more graduate courses and graduate programs in IGE for staff teachers, unit leaders, principals, and other administrators are expected to be developed.

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[11] Appendix F was compiled by the staff of the University of Wisconsin Sears-Roebuck IGE Teacher Education Project.

TABLE IV

MAJOR PROGRAMMATIC ACTIVITIES IN 14 STATES 1973-74

OUTCOMES / STATES	Changeover	Inservice	Under-graduate	Unit Leaders	Principals
California	*	*	*		
Colorado	*	*			
Connecticut	*	*	*		
Illinois	*	*	*		
Indiana	*	*			
Massachusetts	*	*	*	*	
Minnesota	*	*	*		
New Jersey	*	*			
Ohio	*	*	*	*	
Rhode Island	*	*			
South Carolina	*	*			
South Dakota	*	*	*		
Texas	*	*			
Wisconsin	*	*	*	*	*

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As of October 1974, formal programs developed and provided by teacher education institutions for preparing staff teachers, unit leaders, and principals were being provided in only five states (California, Ohio, Massachusetts, Minnesota, and Wisconsin; see Appendix F).

During the 1973-74 year, state groups spent most of their time initiating the state IGE network organization. Even so, from 2 to 20 awareness conferences were held, from 2 to 35 principal-unit leader workshops were conducted, and from 1 to 8 teacher education institutions were involved in refinement activities. In some states, the state education agency assumed the major role in refinement activities. Teacher education institutions became increasingly more involved in conducting awareness conferences and principal-unit leader workshops.

From 1 to 27 schools were implemented during 1973-74, with an average of 13.3 schools being implemented within the 14 states surveyed (see Table I).

In the 14 states, 10 follow the recommended sequence of inservice activities suggested in Figure 4. Four states, Colorado, Massachusetts, New Jersey, and Rhode Island, have adapted this sequence.[12]

The prototypic sequence of inservice activities calls for: (1) a 1-day awareness conference held during the fall (October or November) preceding the opening of school; (2) a commitment phase during which the local education agencies make a decision whether to implement IGE (December-February); (3) a 3-day principal-unit leader workshop (February-April); (4) a 3- to 5-day pre-opening of school workshop (August); (5) a series of 4 1/2-day inservice institutes held from October through April of the first year of implementation; and (6) in-depth workshops and graduate courses for experienced IGE personnel during the maintenance-refinement phase.

The following are exceptions to this model: (1) Colorado has a 4 1/2-day principal-unit leader workshop along with a series of inservice workshops sponsored by the league; (2) Massachusetts requires a 14-day clinical and other inservice activities; (3) the New Jersey local education agencies have the option of either a 3-day principal-unit leader workshop, a 5-day principal-unit leader workshop, or a 10-day clinical; (4) Rhode Island offers the principal-unit leader workshop prior to the commitment (decision) phase.

Some local education agencies have opted for a 2- to 4-week summer institute prior to the opening of school for individual staffs to work and plan on an in-depth basis. These institutes are run by teacher education institutions within the region, sometimes with the district paying for fees and materials.

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[12] This description of the adaptation of the prototype sequence of inservice activities fulfills the requirements of a report describing the state-by-state adaptation of the Wisconsin Department of Public Instruction's model for implementation as per item "d" of A Proposal to Support the Completion of Modification #16 to Contract #OE-5-10-154 submitted to NIE in March 1973. The Center's request to delay the submission of such report and incorporate it in this report was approved by NIE.

Based upon data received, it appeared that network states were able to realize objectives with time frames indicated in their subcontract plans. In these reports, states were requested to submit information concerning: (1) progress in planning for and/or forming State IGE Coordinating Councils (SICCs) and the main activities of the SICC; (2) progress in planning for and/or forming Regional IGE Coordinating Councils (RICCs), a list of the school districts, intermediate education agencies, and teacher education institutions comprising each RICC, and the main activities of the RICC; (3) progress in planning for and/or forming district Systemwide Program Committees; and (4) progress in formulating state-regional-local objectives, strategies, and actual operations in terms of awareness activities, principal-unit leader workshops, and local inservice activities, along with maintenance and refinement activities (seminars, workshops, institutes). These reports reflect the progress of network states in their individual efforts to achieve the five previously mentioned outcomes.

States with a formal IGE network reported a wide variety of staff development activities. During 1973-74, a number of new schools started, and although awareness activities and principal-unit leader workshops and clinicals declined, the number of refinement activities carried out by teacher education institutions increased markedly. This seemed to support the notion that after the first year of operation, as new and different sets of problems arose, the local education agencies increasingly called upon the teacher education institutions for assistance. The teacher education institutions assisted schools in a variety of ways--seminars, 1/2-day inservice institutes, summer workshops or institutes, or graduate courses designed especially for experienced IGE personnel. The UW/SRF Project conducted a national survey during the summer of 1974 and found that several colleges and universities had instituted credit or inservice courses in IGE. Numerous examples of modules were collected for both undergraduate and graduate courses.

In an effort to determine the effectiveness of implementation in the states, the R & D Center collected information from IGE schools implemented in 1973-74.

The R & D Center has established the following minimal criteria for a school to be considered an IGE school: (1) utilization of the IGE/MUS-E organizational design, and (2) adoption of the IPM in at least one curriculum area. The following information from a recent survey of 151 units in 51 schools indicates that for the most part, implementors are providing excellent assistance.

	Units Surveyed	Units Reporting	Schools Surveyed	Schools Reporting
a. Multiage	151	130	51	48
b. Multigrade	151	130	51	48
c. IIC meets once a week	151	130	51	44
d. I & R Units have in-school planning time	151	130	51	45
e. IPM in one curricular area	151	130	51	51
f. IPM in more than one curricular area	151	130	51	18

In the past five years, about 2,000 IGE schools have been implemented. From all indications, the number will continue to increase during the coming years, although at a declining rate. Both State IGE Coordinating Councils and Regional IGE Coordinating Councils are now building the capability to provide more inservice for both existing IGE schools and schools beginning to implement IGE. In most states, although the number of IGE schools that were implemented declined last year (1973-74), implementing agencies are now able to provide awareness conferences, principal-unit leader workshops, and other staff development activities. States are no longer dependent solely on resources from the R & D Center, as expertise is being developed within the individual states. However, if the goal of the R & D Center is to be realized, additional incentives must be made available to reverse the declining rate of implementation.

Future Directions

As indicated earlier, the R & D Center is making a concerted effort to further assist and encourage states in the development of Regional IGE Coordinating Councils. In the past year, state networks have had difficulty forming a state IGE network from former league arrangements without destroying previously established relationships. New organizational arrangements are required if the network concept is to flourish. The network concept requires representation from various agencies at all levels. Some see leagues as synonymous with RICCs, but in most cases, leagues cannot function as RICCs unless all types of agencies operate with definite roles and responsibilities.

As the Regional IGE Coordinating Councils develop, many of the roles and responsibilities formerly assumed exclusively by the state education agency can now be assumed by this regional arrangement. When teacher education institutions become more involved in the implementation of IGE, more inservice or staff development activities can be provided for local schools.

As indicated in Table I, the number of IGE schools that have been implemented has not grown at the same rate as it did when states were given grants for implementing a specified number of IGE schools.

There appears to be a need for monies to be provided to states for the express purpose of implementing IGE in additional schools. In 1971 and 1972, the number of new IGE schools continuously increased, but during the year 1973-74, the rate declined markedly.

In past years, the involvement of state education agencies has been shown to be an integral factor in the success of the implementation strategy. The more direct the role played by the state education agency, the smoother the operation within the state. The greater the resources provided by the state education agency, the greater the chances of success and resolution of problems that might develop. The state education agency plays a role far more significant than that of merely appointing an IGE coordinator; its role is important and unique.

Coordination and dissemination of plans and information seem within the realm of the traditional role played by that agency. However, formulating and strengthening new relationships between the state education agency, intermediate education agencies, teacher education institutions, and local education agencies is a new but significant role for the state education agency. The role of the state education agency as outlined in the subcontract is not intended to place the agency in an "advocacy" role for IGE; rather, the subcontract asks for a re-examination of the agency's role and its relationships with both teacher education institutions and local education agencies. Thus, the state IGE network is intended to facilitate the role that the state education agency has in its relationship with local education and other agencies. The state IGE network can also be used to coordinate other innovative programs within a state.

In the past few months, there has been resistance to attempts to elicit the cooperation of the state education agencies in 9 new states. They view their part of assisting in the facilitation and implementation of IGE as conflicting with their traditional non-advocacy role. In 6 of the 9 new state IGE networks, an agency other than the state education agency is the agent for the subcontract, although the state education agencies have indicated that they will participate in the SICC. It is likely that larger amounts of funds would be more attractive to state education agencies. If they are to assume the kind of role implicit in the subcontract, they need to know that enough money is available to assure meeting the terms of the subcontract.

Another situation appears to be developing in states that have been implementing IGE for five years. Presently, Wisconsin is in a unique position in terms of realizing the goal established if IGE is to become a viable alternative form of schooling; more than 14 percent of the elementary schools and 25 percent of the school districts in Wisconsin are implementing IGE. There appears, on the part of schools that have not previously participated in the program, a reluctance to implement IGE. The state IGE coordinator sees a need to develop a new strategy for later adopters of IGE.

The R & D Center is presently providing financial and technical support to the 23 states wishing to develop an IGE network to facilitate the installation of IGE and its related products. During the period from July 1974 to December 1975, the Center will provide direct grants to 9 new states. Subcontracts are being negotiated with an agency in each state to specify schools that will install IGE products and practices; to plan workshop participation; and to plan implementing/refining activities associated with network establishment and maturation. Two one-day planning meetings will be conducted by Center personnel and network representatives, and one three-day meeting will be held with R & D Center, UW/SRF Project, and SICC personnel.

The Center hopes to strengthen relationships with network states through a series of leadership training workshops; on-site visitation to states to meet with State IGE Coordinating Councils; visits to the R & D Center by members of the State IGE Coordinating Councils; and consultant services to the State IGE Coordinating Councils.

The R & D staff remains in constant contact with states through the network system. These contacts have been found not only to foster better relationships between Center staff and the state network, but also to give the Center feedback regarding IGE activities, problems, and concerns within the states. This contact is facilitated through frequent written correspondence and telephone calls.

V

LEADERSHIP DEVELOPMENT WORKSHOPS

This chapter will focus on: (1) the objectives for leadership development of the R & D Center; (2) the history of past R & D Center efforts to develop leaders; (3) descriptions and evaluations of the leadership workshops conducted by the R & D Center under the referenced grant with a discussion of proposed changes for improving the effectiveness of future leadership development activities; and (4) plans for leadership development activities for 1974 and 1975.

General Objectives for Leadership Development Activities

The R & D Center engages in two kinds of leadership development activities. One type focuses on giving personnel an opportunity to learn concepts and acquire skills necessary for assisting various agencies in making the changeover to IGE and in refining their implementation of IGE. The second kind is working with leadership in the state IGE networks to improve the organizational and programmatic concerns of the networks. The leadership development activities are carried out in workshops, planning meetings, and a variety of one-to-one contacts. The following objectives guide the leadership development activities of the R & D Center:

1. When a participant has completed a workshop, that person will have the requisite knowledge of concepts and practices of IGE.
2. When a participant has completed a workshop and assisted in implementation activities, that person will have the capabilities to conduct the activities which have been identified as necessary in the five implementation phases.
3. When a person has participated in SICC planning meetings sponsored by the R & D Center and in other forms of contacts with the R & D Center in a one-year period, that person will have a knowledge of the organizational and operational aspects of a state IGE network.

History of Leadership Development, 1968-73

The following discussion will be divided into two parts. The first part will deal with efforts to provide opportunities for personnel from the states to acquire skills and understandings for assisting agencies in the changeover to IGE and in refining the implementation of IGE concepts and practices. The second part will discuss the activities associated with cooperating with state IGE network leaders as they organize the network and execute plans according to the five outcomes for state IGE networks.

Implementation Leadership Activities.[13] Prior to receiving OE funds in the spring of 1971, some leadership development was being conducted in cooperation with the Wisconsin Department of Public Instruction. These efforts focused primarily on preparing teams of principals and unit leaders to understand the concepts of IGE and then to work with their local building staffs to make the changeover to IGE. The efforts were carried out in workshops and summer-session courses on the University of Wisconsin-Madison campus. In the spring and summer of 1968, the R & D Center produced a series of 18 videotapes and published the first guidelines for implementation. These materials, utilizing the experiences of staffs in the first 7 IGE schools, were used in workshops for persons in Wisconsin and several other states, including Illinois, Iowa, Minnesota, Ohio, and California.

The first funds for the national implementation of IGE were awarded the R & D Center in April 1971 (Project Plan and Budget Requests for the Nationwide Installation of Multiunit Schools, 1971). The following were the first four items in the scope of work for those funds:

1. Assess the total needs for the training and staff development of personnel to enable them to install and maintain multiunit schools;
2. Develop operational plans for all staff development activities including first phase installation, short-term institutes, and academic-year residential programs for lead teachers, building principals, staff teachers in various curriculum areas, and relevant central office personnel;
3. Conduct necessary workshops and institutes to train installation teams and personnel from state education agencies, local school districts, and teacher education institutions;
4. Coordinate the training and staff development activities conducted by installation teams, teacher education institutions, state agencies, and local school districts.

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[13] This portion of the report (to page 57) fulfills the requirements of a report which in part was to describe the workshops for state IGE coordinators as per item "h" of A Proposal to Support the Completion of Modification #16 to Contract #OE-5-10-154, submitted to NIE in March 1973. The Center's request to delay the submission of such report and incorporate it into this report was approved by NIE.

The initial leadership workshop under these funds was held at the University of Wisconsin-Madison, June 14-18, 1971. The purpose of the workshop was to provide experience that would permit personnel to carry out their respective roles in the implementation of IGE on a nationwide basis. Additional training was provided for the 10 original state[14] IGE coordinators during a three-day institute held in Madison, October 18-20, 1971. The purpose of the three-day institute was to further clarify and refine the roles of such personnel as well as to provide an opportunity for discussion of specific problems encountered during the initial stages of implementation.

Evaluation of the June 1971 workshop indicated that most participants were satisfied with its organization and activities. Administration of the Kropp-Verner Evaluation Scale resulted in 120 positive comments, as opposed to only 27 negative ones, of which 20 indicated only mild dissatisfaction. The effectiveness of the workshop has been further demonstrated by the fact that the great majority of those attending the June 1971 seminar are still involved in implementing IGE. A survey of responses gathered at the conclusion of the October 1971 conference reveals that only two participants felt their needs had not been met.

In addition to the two Madison seminars, three major implementation efforts were undertaken by the Center's implementation staff with the cooperation of state IGE coordinators, teacher educators, and local school personnel in states which had contracts with the Center. In the various states, the purpose of these efforts was to assist personnel in applying skills and understandings as they worked directly with schools. These were in effect "apprenticeship" experiences. Efforts consisted of conducting three-day principal-unit leader workshops in the 10 states, 12 one-week advanced institutes for experienced principals and unit leaders, and an academic-year residential program.

The two 1971 implementation leadership development sessions were followed by a series of workshops for state and district IGE coordinators held February 2-4, 1972; July 26-27, 1972; and October 17-19, 1972. These sessions were aimed at assisting state IGE coordinators overcome obstacles to meeting the requirements of their subcontracts with the Center. Topics covered included developing a prototype of a principal-unit leader workshop, developing a strategy for reporting implementation progress to the Center, identifying common implementation problems and some possible solutions, and becoming aware of Center products and refined implementation techniques.

The next implementation leadership activity, held in February 1973, was a three-day conference for state and district coordinators and other people in education interested in learning more about

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[14] California, Colorado, Connecticut, Illinois, Indiana, Minnesota, New Jersey, Ohio, South Carolina, and Wisconsin.

IGE. The objectives established for the conference were to improve the participants' competencies in facilitating communications in an IGE school and to refine their skills as evaluators of IGE schools.

Following the February 1973 meeting, there were no federal funds to continue supporting the national implementation of IGE. As a consequence, the R & D Center made no plans at that time for workshops to assist personnel in acquiring or refining implementation capabilities. Later in this chapter, attention will be devoted to activities made possible by NIE funding in July 1973.

Network Leadership Development Activities. During the first two years (1971-72 and 1972-73) of the national implementation of IGE, the state IGE coordinators were the only persons who, with assistance from the R & D Center implementation staff, were conducting activities to help schools make the changeover to IGE. While the major portion of the activities described in the preceding part was devoted to implementation skill acquisition and improvement, some time was spent in assisting in the development of strategies for establishing relationships among agencies. The first step toward creating what was to become a state IGE network was related to forming mini-networks of IGE schools, a few of which involved teacher education institutions. Another step was the identification of local school district IGE coordinators. State IGE coordinators also began to identify and coordinate within-state IGE resource personnel to assist in or to conduct changeover and refinement workshops.

In late 1972 and early 1973, the R & D Center and the UW/SRF Project concluded that additional efforts were required to begin involving teacher education institutions in IGE. As a result, a national conference designed specifically for teacher educators interested in learning more about IGE was held in Madison on January 18-19, 1973. In addition to the usual conference objectives of acquainting the participants with the status of Center products and reviewing implementation strategies, two objectives were presented which indicated advances in the national implementation of IGE. One objective was to determine the possible strategies for and feasibility of forming state IGE networks comprised of teacher education institutions, state education agencies, and local education agencies. The second objective was to determine the feasibility of initiating a national IGE teacher education consortium. The discussions elicited by these two objectives resulted in the determination that teacher education institutions were interested in cooperating in state IGE networks, and in the selection of representatives to consider the development of a national consortium. (See Chapter IV for a description of the relationship of this consortium to representatives of the state IGE coordinators.)

In March and June of 1973, the R & D Center supported two important meetings which focused on the further development of leaders for state networks and a national network. In actuality, these meetings were self-development efforts by the then existing leaders in the states, including state IGE coordinators, teacher educators, and local school district personnel. The R & D Center and the UW/SRF Project played a facilitating role for these workshops.

On March 29-30, 1973, the representatives of the state IGE coordinators and the teacher education consortium and officials of the R & D Center and the UW/SRF Project met to consider a proposal for forming a national IGE organization (Rossmiller & Klausmeier,1973). It was decided to bring the matter of a national IGE organization to a meeting of all the state IGE coordinators and representatives of the teacher education consortium in June 1973.

The meeting of June 25-27, 1973 had three major objectives:

1. To form a national IGE organization.
2. To consider the establishment of a national IGE clearinghouse.
3. To plan the first national IGE conference.

All three objectives were realized. The Association for Individually Guided Education was established, planning for a clearinghouse was initiated, and two national conferences have been held.

By June 1973, the leadership foundations for both state networks and a national network had been established. The award to the R & D Center by NIE in July 1973 and the funding of the UW/SRF Project made possible the further strengthening and expansion of this leadership capability.

Leadership Development Activities, 1973-74

In July 1973, NIE awarded Grant No. NE-G-00-3-0221 to the R & D Center for a third year of national IGE implementation.[15] The following are the objectives outlined in the grant's scope of work which pertain to the development of leadership capabilities:

1. To conduct leadership institutes to prepare educational leaders to carry out all five phases of the implementation model.
2. To evaluate the development of the state IGE networks and to evaluate the leadership workshops.

Funds from this grant permitted the Center to conduct the following workshops:

TYPE OF WORKSHOP	DATE	PLACE
Leadership Workshops for IGE Implementors	Feb. 25-March 1, 1974 April 22-26, 1974 May 13-17, 1974	Madison, WI San Francisco, CA Cranston, RI
Leadership Workshop for Teacher Educators	June 17-21, 1974	Eau Claire, WI
State IGE Coordinating Council Planning Meetings	Feb. 11-12, 1974 Sept. 30-Oct. 2, 1974	Chicago, IL Indianapolis, IN

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[15] This section of the chapter is a partial fulfillment of the final report requirements of the referenced grant.

This section is divided into four parts. The first part describes implementation leadership development activities. The second part is an evaluation of these activities. The third part discusses suggested improvements for future workshops. The fourth part discusses network leadership development activities.

Implementation Leadership Activities. During the period of the grant, four one-week implementation leadership workshops[16] were conducted. The purpose of these workshops was to provide opportunities for states to develop additional within-state personnel resources to assist in carrying out the five outcomes for state IGE networks. Three of the workshops were designed to prepare personnel for assisting schools in making the changeover to IGE and for assisting continuing IGE schools (Outcomes 1 and 2, respectively). The fourth workshop was designed to help teacher educators plan and develop modules and and courses for unit leaders and other staff teachers, and graduate modules and courses for IGE principals and other school administrators (Outcomes 3, 4, and 5, respectively).

The first of four implementation leadership workshops was held February 25-March 1, 1974. Twenty persons representing 10 states attended, 19 of whom were supported by the grant. The basic objective established for this workshop was to provide activities which would enable participants to become knowledgeable about:

a. the concept and practices of IGE;

b. an implementation model for IGE in the context of state IGE networks;

c. how to run awareness conferences;

d. how to run principal-unit leader workshops; and

e. some R & D Center products.

An attempt was made to evaluate the workshop by gathering data with a knowledge test which had been developed for that purpose. Results indicated that the workshop was successful in terms of the participants' gaining the requisite knowledge. Participants also stated that they considered the workshop to be highly useful and satisfactory.

The second implementation leadership workshop was held April 22-April 26, 1974. In addition to the objectives for the first workshop, participants were expected to be able to demonstrate knowledge of the IGE performance objectives as a means of evaluating the growth of IGE schools.

An evaluation instrument was prepared for this workshop in an effort to learn about the effectiveness of the week's activities. The administration of the instrument took too much time and created negative feelings on the part of the participants. After analyzing the data gathered with the evaluation instrument, it was determined that the information gained was not worth the time spent in and antagonism generated by the administration of the instrument. Nonetheless, participants generally were satisfied, and they learned the basic concepts and practices of IGE and understood the sequence of events required to help schools make the changeover.

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[16] Sample agendas for each of the four workshops were attached to the quarterly reports submitted during the period of the grant.

The third implementation leadership workshop was held May 13-17, 1974. The objectives established for this workshop were identical to those of the April 22-26 workshop. Participants judged this workshop overall as above average in its effectiveness.

Prior to a discussion of the fourth implementation leadership workshop, the reader is referred to Table V, which indicates the numbers of persons by state and type of agency that attended the first three workshops. It is interesting to note that 15 of the 18 states represented at the three workshops either have developed or will develop (in 1974-75) state IGE networks.

The fourth of the implementation leadership workshops differed significantly from the other three in that it was designed specifically for teacher educators and was to provide them with an opportunity to develop modules of instruction related to IGE. This workshop was held June 17-21, 1974. Table VI shows the exact distribution of the 54 participants.

The objective for this conference was that participants would be able to develop outlines and tentative procedures which may be used in:

1. conducting credit or noncredit modules or credit courses for helping schools to make the changeover to IGE;
2. conducting credit or noncredit modules, courses, or institutes for experienced IGE school staffs;
3. conducting modules, courses, and programs for graduate credit for unit leaders and staff teachers;
4. conducting modules, courses, and programs for graduate credit for building principals and other administrators;
5. conducting modules, courses, and programs for undergraduate (preservice) credit for prospective IGE teachers.

Participants provided the presenters with feedback that indicated that they were very satisfied with the format and activities of the conference. One participant reflected the general reactions to the workshop in the following comment:

> The group of teacher educators appeared to share my sentiments judging from private and public comments. The key phrase permeating the conference was that we all felt a 'sense of renewal' and since this is one of the key concepts of IGE, we might say that the message came through.

TABLE V

PARTICIPANTS AT THREE IGE IMPLEMENTATION LEADERSHIP WORKSHOPS DURING 1974

WORKSHOP & AGENCY / STATE	2/25/74-3/1/74				4/22/74-4/26/74				5/13/74-5/17/74				Totals
	TEI***	SEA	IEA	LEA	TEI	SEA	IEA	LEA	TEI	SEA	IEA	LEA	
*California				2	11	20	2	11				1	46
*Connecticut	1												2
*Illinois				1									1
Kansas								1					1
Maine												1	1
*Massachusetts											2		2
**Michigan	1												1
*Minnesota	4			1	1								6
**Missouri	1												1
Nebraska								1					1
**New Hampshire	2	1											3
*New Jersey									2			1	3
**New York									1	4	9	13	27
*Ohio			1						3			2	6
*Rhode Island												1	1
*South Dakota	4												4
**Utah								2		2			4
*Wisconsin	1												1
Totals	14	1	1	4	12	20	2	15	6	6	11	19	111

*States with state IGE networks supported by the R & D Center and/or the UW/SRF Project

**States which are projected to develop state IGE networks in 1974-75 with support from the R & D Center

***Abbreviations are as follows: Teacher education institution (TEI); state education agency (SEA); intermediate education agency (IEA); local education agency (LEA)

Note: Totals by type of agency are as follows: TEIs, 32; SEAs, 27; IEAs, 14; LEAs, 38

TABLE VI

IGE TEACHER EDUCATION LEADERSHIP WORKSHOP
JUNE 17-21, 1974

STATE \ AGENCY	Teacher Education Institution	State Education Agency	Intermediate Education Agency	Local Education Agency	Totals
*Connecticut	3				3
*Illinois	2			2	4
**Kentucky			2		2
*Massachusetts	1		1		2
*Minnesota	2				2
**New Hampshire	2				2
*New Jersey	2				2
**New York	17	1			18
*Ohio	3				3
*Rhode Island	1				1
*South Carolina	4				4
*South Dakota	3				3
**Virginia	1				1
*Wisconsin	5			1	6
Totals	46	1	3	3	53

*State IGE Network funded by the R & D Center and/or the UW/SRF Project

**States which are projected to develop state IGE networks in 1974-75 with support from the R & D Center

Evaluation of the Implementation Leadership Workshops. This part discusses the results of two different evaluation activities. It should be noted at this point that the evaluations showed that the workshops were generally good workshops, in terms of both knowledge and satisfaction gained on the part of the participants. The items reported here will briefly discuss a few weaknesses identified in the evaluation; these serve to help plan more effective workshops in the future. The first evaluation was of the April and May workshops. The second evaluation was of the activities that the conference participants carried out after attending the workshops.

Two evaluation efforts were carried out in conjunction with the April and May workshops. The basic difference in the assessment strategies of the two workshops is that at the April workshop, participants were asked to complete a form at the end of each session, and at the May workshop, at the end of each day. As was previously mentioned in this report, the time and energy required of the participants to complete the evaluation generated some anxiety. Thus, it was determined to use the instrument at the end of each of the first four days of the May workshop.

Other concerns which surfaced in the evaluations are related to the reasons for attending workshops. Sometimes participants attended the workshops because they were told by someone in their agency that they must, and this may have created negative attitudes which could not possibly be overcome during sessions. Data showed that 35 percent of the responders either were told to learn something about IGE or did not know why they were at the conference. One obvious negative result is that such persons either resent their attendance or will be confused about their role when they return to their localities. Another consequence, less obvious, perhaps, is that such participants often must devote much time to learning about the fundamentals of IGE and never acquire the skills and understandings required of an implementor.

Analysis of the day-by-day evaluations obtained at the April workshop revealed two weaknesses. Introductory and general sessions did not generate enthusiastic responses from participants. When the presentations related to more specific topics and problems, more positive responses were received on the evaluation forms. On the third day of the workshop, participants began experiencing an "information overload," and their enthusiasm for the workshop began to wane. This phenomenon will be considered in planning future workshop agendas.

Selection of workshop participants was determined almost completely by the state IGE coordinators or contact persons in the various states. Not only did these persons seek to secure additional IGE resources for their states, but often they took advantage of the situation to encourage key persons to become informed about IGE. The expectations of such persons were not always in accordance with the objectives of the workshop.

The second major evaluation effort carried out by the R & D Center took the form of determining how frequently participants engaged in IGE implementation activities subsequent to their attending a leadership workshop. Separate questionnaires were designed for teacher educators, state education department personnel, and local school personnel. Approximately 45 percent of the participants responded to the questionnaires.

A few excerpts from each of the different questionnaires indicate the extent of the participants' involvement in implementing IGE in the nation's schools. From the teacher educator's questionnaire, one can deduce the following:

1. Alterations to existing courses were being made by 67 percent of the responders.
2. New courses are being developed around IGE concepts by 33 percent of the responders.
3. Modules have been developed around IGE concepts by 33 percent of the responders.
4. IGE-related materials have been requisitioned for university or department libraries by 50 percent of the responders.
5. Since attending a leadership workshop, 35 percent of the responders have conducted or served as a resource person at an awareness conference.
6. Since attending a leadership workshop, 20 percent of the responders have conducted or served as a resource person at a principal-unit leader workshop.
7. Since attending a leadership workshop, 25 percent of the responders have become a league facilitator.
8. Since attending a leadership workshop, 20 percent of the responders have participated in state network activities. However, in those states where no networks exist, over 67 percent of the responders have been active in forming a state network.

Information compiled from the questionnaire of state education department personnel indicates that 50 percent or more of the representatives in this group have been most active in:

1. conducting or serving as a resource person for awareness conferences;
2. serving as resource people at pre-school workshops;
3. establishing state networks in states where none existed prior to the workshop.

As might be expected, most of the implementation activities engaged in by local school personnel have been limited to their own district. Data from this group's questionnaires revealed that:

1. More than 67 percent have conducted formal IGE inservice training in their school district.
2. More than 67 percent have served as an IGE implementation resource person for schools in their district.

3. More than 70 percent have made informational presentations about IGE to groups in their school district.
4. More than 92 percent have provided IGE-related materials to schools or groups in their district.

Several generalizations can be drawn from the questionnaire data:

1. State department personnel confine their implementation activities primarily to conducting or serving as resource people at awareness conferences and participating in state network activities.
2. Local school personnel limit much of their implementation activities to their local school district.
3. Teacher educators participate almost equally in all phases of implementation. Apparently, people in this group have the most flexibility in their schedules. The data indicate that a higher percentage from this group participate in state network activities and league/regional functions and hold the position of IGE implementor/facilitator.
4. Attendance at a leadership workshop prepares one to contribute to the IGE implementation effort.
5. Attendance at a teacher education workshop often leads to alterations in teacher training courses to reflect IGE concepts.

Improvements in Future Implementation Leadership Workshops. Data from the implementation workshops suggest changes that the R & D Center's Implementation staff is incorporating into plans for future workshops. These changes are in three major areas:

1. A wider variety of activities needs to be made available to the participants.
2. Opportunities to visit successful IGE schools need to be provided.
3. Participants should be selected to attend future workshops for the purpose of achieving the objectives stated in the agendas.

The range of activities for future implementor workshops will be expanded to include several simulation activities. These simulations will include small groups working as Regional IGE Coordinating Councils (RICCs) whose task will be to apply information received in earlier sessions to develop plans for conducting implementation activities. At least three of these activities will take place during the week. The simulations will be related to planning and conducting awareness, commitment, and principal-unit leader workshop activities.

Visits to successfully operating IGE schools will be arranged for participants on the fourth day of the implementors' workshops. The purposes of these visits are to provide conferees with an opportunity to interact with the building staff in planning and shared decision-making activities carried out by the Instructional Improvement Committee and the Instruction and Research Units (I & R Units); and to observe children functioning in an environment where they are grouped into multiaged units.

Criteria for the selection of workshop participants are being developed. Because the concepts of IGE have been disseminated nationwide, participants should be attending workshops for purposes other than that of becoming informed about IGE. Two points to consider when selecting future recipients of workshop stipends are (1) participants are already aware of IGE and want to become involved in the efforts to implement IGE in the nation's schools; and (2) participants know of the objectives for a particular workshop, and their assignment provides them the opportunity to meet those objectives.

Finally, informal feedback from several contacts in the states indicates a need for "apprenticeship" activities for persons attending workshops. While persons usually leave the workshops with sufficient knowledge, they are often hesitant to assume initiative without practical experience in conducting implementation activities. Plans are now being formulated to provide opportunities for such persons to assist experienced persons in conducting awareness conferences, commitment-phase activities, and other inservice workshops. Once implementors have some practical experience, they will be invited to attend a brief, two-day follow-up session conducted by the R & D Center's Implementation staff.

Network Leadership Development Activities. The R & D Center has always cooperated with IGE leadership in each of the states to establish relationships among agencies that want to participate in implementing IGE and in planning mutually rewarding activities. It is these relationships and plans that permit the IGE support system to be effective in assuring the continuing success of IGE. During the period of the referenced grant, the R & D Center cooperated with leaders from the various states in two ways: through planning meetings that brought together representatives from the SICCs in the 14 original state IGE networks and from the 9 prospective networks, and through on-site visits to each of the states. In this report the discussion will focus on the planning meetings.

On February 11-12, 1974, a two-day planning meeting was held. The meeting was cosponsored by the R & D Center and the UW/SRF Project. Each state was invited to send a teacher educator, a local district superintendent or other local central office staff person, and the state IGE coordinator. The R & D Center, the UW/SRF Project, and the networks shared the expenses. Persons were also invited from states other than the 14 states presently establishing networks, but they paid their own expenses. Fifty-eight persons from 20 states attended the meeting. The purpose of the planning meeting was to bring together the various representatives and discuss with them their progress and problems in forming the networks. The discussion provided the setting in which to explain the prototype of a state IGE network. The prototype (described earlier in this report) proved to be helpful for the representatives as they organized their respective networks. The meeting also provided an opportunity to firmly establish the dates and sites for the five upcoming implementation leadership workshops.

The second planning workshop supported by funds from the NIE grant was held September 30-October 2, 1974. Each of the 23 states having formal or informal agreements with the R & D Center were asked to send participants who could represent their State IGE Coordinating Councils; 107 persons attended the meeting.

Designed as a planning workshop, the objectives of the meeting focused on having each of the SICCs prepare long-range plans for the implementation of IGE according to the model of implementation described in the *Manual for Starting and Maintaining State IGE Networks* (Klausmeier, Walter, & Lins, 1974). The objectives for the planning workshop centered around the five outcomes for state IGE networks (see page 38). Appendix G includes the complete agenda for the three-day conference.

With a few exceptions, each of the state committees produced long-range plans compatible with the five outcomes. Copies were made of the plans from the individual states and distributed to the other states. According to many comments made by participants during the conference, knowledge that their work would be copied and distributed to the other state committees motivated them to produce as worthwhile a set of plans as possible. As an example of the productive efforts expended by members of the SICCs, a complete set of materials prepared by the Massachusetts group is included in Appendix H.

Leadership Development Activities, 1974-75

Under funds granted the R & D Center by NIE in June 1974 (*Continuation of the Dissemination/Implementation of Individually Guided Education: An Alternative Form of Elementary Schooling*, 1974), the R & D Center will continue to provide implementation leadership workshops and to cooperate with the SICCs in network leadership development activities. Implementation leadership workshops have been expanded to include two of the R & D Center's curriculum and instruction products, the *Wisconsin Design for Reading Skill Development* (WDRSD) and *Individually Guided Motivation* (IGM). Network leadership development activities will consist of visits by the R & D Center's Implementation staff to the states, visits by individual SICCs to the R & D Center, and a spring 1975 planning meeting for all SICCs.

The following schedule of implementation and planning workshops has been established:

TYPE OF WORKSHOP	DATE	SITE
Leadership Workshops for IGE Implementors	Feb. 3-7, 1975 Apr. 14-18, 1975 Oct. 20-24, 1975	Tampa, Florida Denver, Colorado St. Louis, Missouri
Leadership Workshops for Teacher Educators	Jan. 13-17, 1975 June 2-6, 1975 Aug. 11-15, 1975	San Jose, California Hartford, Connecticut Madison, Wisconsin
Leadership Workshops for IGM Implementors	March, 1975 June, 1975	Columbus, Ohio Salt Lake City, Utah
Leadership Workshops for WDRSD Implementors	Feb. 5-7, 1975 Apr. 7-9, 1975 May 28-30, 1975	San Francisco, California Washington, DC Madison, Wisconsin
Planning Workshop for State IGE Coordinating Councils	May 5-7, 1975	Minneapolis, Minnesota

The objectives for these workshops will be similar to those for previous implementor workshops. The proposed improvements for future workshops described in the previous section will be implemented while completing the funded activities.

Another leadership development effort is being initiated by the R & D Center under the scope of work of the June 1974 funding. The R & D Center is establishing the first four of a possible seven or eight multistate IGE institutes. These institutes will eventually be able to provide implementation leadership workshops for all R & D Center products and for the UW/SRF IGE Teacher Education Project materials.

Summary

The goal of the R & D Center's leadership development activities is that within five years, any state IGE network will become a mature organization, one that has made the transition into the renewal phase. Such a network will have the requisite organizational arrangements and sufficient personnel resources to realize the outcomes for state IGE networks. The network will also be a member of the Council of Representatives of AIGE and will be affiliated with the appropriate IGE institutes.

To this end, the R & D Center sponsors and conducts implementation workshops and planning meetings and maintains frequent contact with each of the SICCs.

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Technical Report No. 345 (Part 2 of 2 Parts)

A STATUS REPORT ON THE IMPLEMENTATION OF IGE: 1971-1974

by James E. Walter, Booker T. Gardner, and Harold G. MacDermot

Report from the Project on Materials and Strategies
for IGE Staff Development and Implementation

Based on a Final Report to the National
Institute of Education for Grant No. NE-G-00-3-0221

Wisconsin Research and Development
Center for Cognitive Learning
The University of Wisconsin
Madison, Wisconsin

July 1975

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Center Contract No. NE-C-00-3-0065

WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING

MISSION

The mission of the Wisconsin Research and Development Center for Cognitive Learning is to help learners develop as rapidly and effectively as possible their potential as human beings and as contributing members of society. The R&D Center is striving to fulfill this goal by

- conducting research to discover more about how children learn
- developing improved instructional strategies, processes and materials for school administrators, teachers, and children, and
- offering assistance to educators and citizens which will help transfer the outcomes of research and development into practice

PROGRAM

The activities of the Wisconsin R&D Center are organized around one unifying theme, Individually Guided Education.

FUNDING

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APPENDIX A

Prototype Agendas for:

1. Awareness Conference
2. Principal-Unit Leader Workshop
3. 3-Day Pre-Opening of School Workshop
4. 5-Day Pre-Opening of School Workshop

PROTOTYPIC AGENDA FOR A ONE-DAY AWARENESS CONFERENCE

The objective of the one-day workshop is to help building administrators and central office personnel develop an awareness of the Individually Guided Education (IGE) concepts. This conference should enable the participants to decide whether or not any of their schools might make the organizational change.

9:30-10:15	Greetings, history, and rationale of the R & D Center/implementation agency effort Discussion of workshop objectives Overview of IGE Film: "Think Kids" Seven components of IGE
10:15-10:30	Break
10:30-11:00	The prototypic MUS-E organization Systemwide Program Committee (SPC) Instructional Improvement Committee (IIC) Instruction and Research Unit (I & R Unit)
11:00-11:30	The Instructional Programing Model (IPM) for the individual student
11:30-12:00	Instructional programs and curriculum materials compatible with the instructional programing model, e.g., the Wisconsin Design for Reading Skill Development
12:00- 1:15	Lunch
1:15- 2:00	"Through the Eyes of the Principal"
2:00- 2:45	"The Role of the Unit Leader--The Team Approach"
2:45- 3:00	Break
3:00- 3:30	"Where Do We Go From Here?"

PROTOTYPIC AGENDA FOR A THREE-DAY PRINCIPALS AND PROSPECTIVE UNIT LEADERS (PUL) WORKSHOP

Session I
- Overview and workshop objectives
- Origin of IGE
- Report of IGE national implementation
- Film: "Think Kids"
- Seven components of IGE

Session II
- Workshop objectives and IGE: A simulation
- Phase 1: Preassessment
- Phase 2: Instructional sessions
  - "Instructional Programing in IGE"
  - "MUS-E--Roles and Responsibilities"
  - "The Multiunit School--Its Organization and Operations"
  - "Grouping Patterns"
  - "Educational Objectives"
  - "Assessment in IGE"
  - Independent activity
- Phase 3: "Rap-up" of the day's activities

Session III
- Phase 1: Overview of Session III
- Phase 2: Problem identification process
- Phase 3: "Use of Auxiliary and Special Area Personnel"
  - "Grouping Students for Instruction"
  - "Logistics of Implementation--Organization of Instructional Materials"
  - "Logistics of Implementation--Curriculum, Staff, and Pupil Scheduling"
  - "Managing Pupil Progress--Record Keeping"
  - "Reporting Pupil Progress"
  - "Impact of Teaming"
  - Rap session on topics such as "Selecting an IGE Curricular Area" and "Establishment of Visitation Policies"
- Phase 4: Curricular products

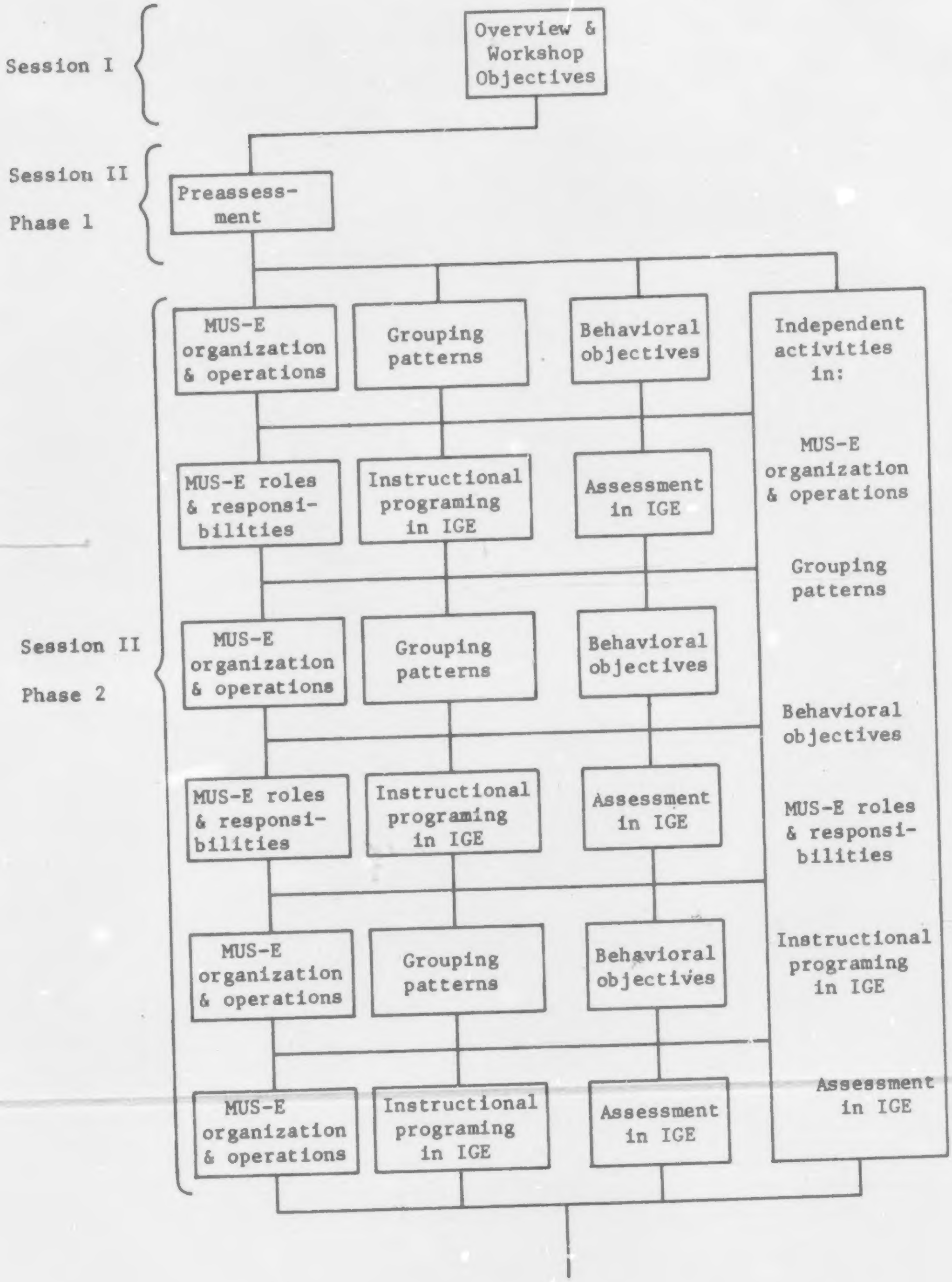
Session IV Phase 1: Overview and objectives of IIC tasks

Phase 2: The IIC from each school will work to accomplish the following:

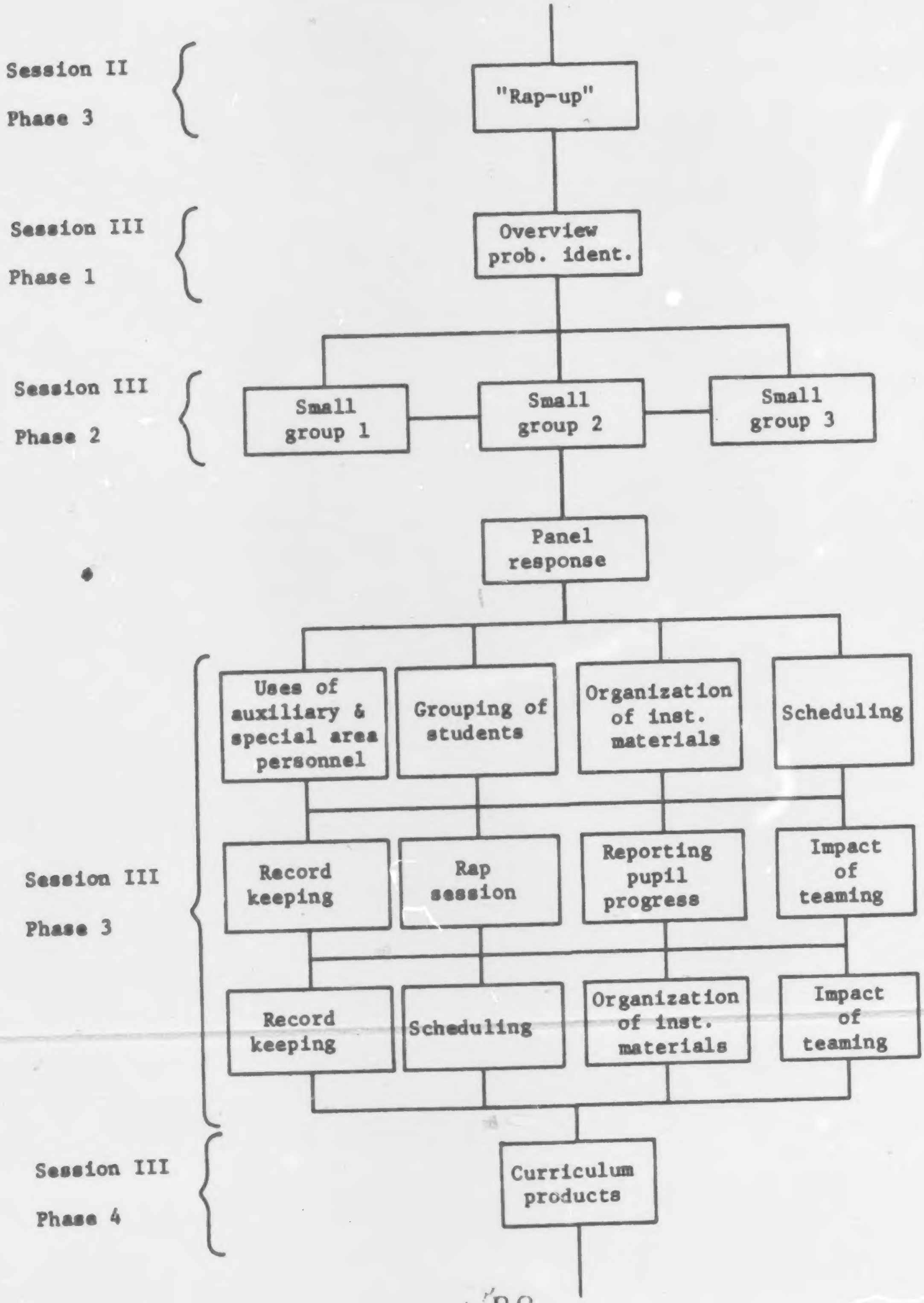
- a. a possible MUS-E organizational design for their school
- b. a tentative staff inservice program
- c. the proposed roles and responsibilities for the various staff positions
- d. suggested ways of obtaining three to five hours of planning time for each unit
- e. plans to obtain paraprofessional assistance on a paid basis, and/or alternative plans to obtain paraprofessional assistance if not available on a paid basis
- f. the proposed curricular area for which the Instructional Programing Model will be applied

Session V Workshop evaluation and "rap-up"

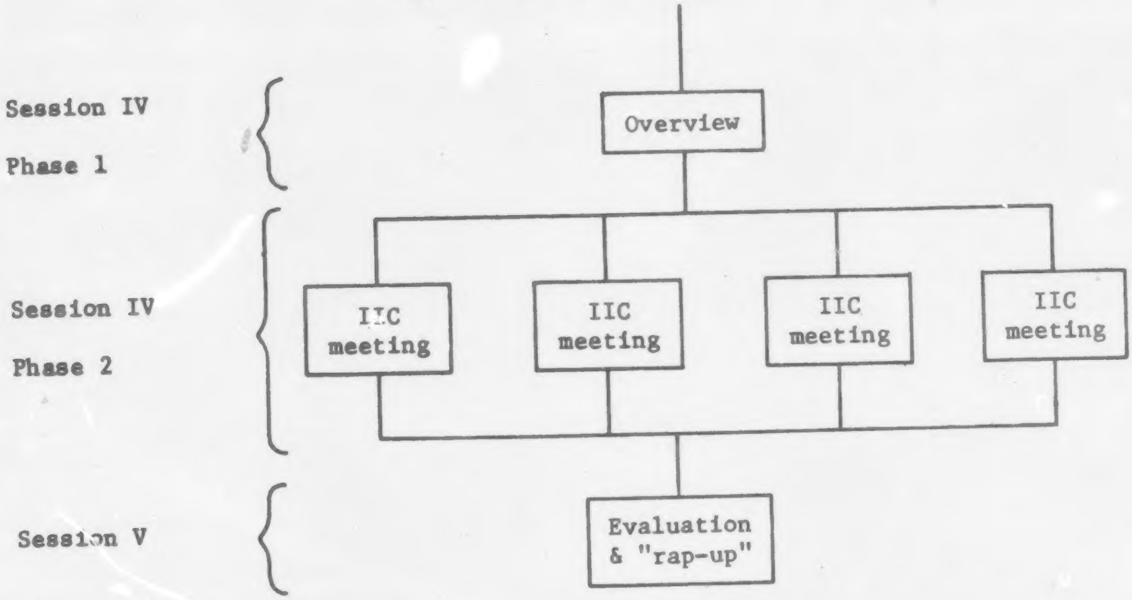
SUGGESTED FLOW OF ACTIVITIES FOR A THREE-DAY PRINCIPAL-UNIT LEADER (PUL) STAFF DEVELOPMENT WORKSHOP


Session I
Overview & Workshop Objectives
Session II Phase 1
Preassessment
Session II Phase 2
MUS-E organization & operations
Grouping patterns
Behavioral objectives
Independent activities in:
MUS-E roles & responsibilities
Instructional programing in IGE
Assessment in IGE
MUS-E organization & operations
Grouping patterns
Behavioral objectives
MUS-E roles & responsibilities
Instructional programing in IGE
Assessment in IGE

PUL WORKSHOP (Continued)


Session II
Phase 3
"Rap-up"
Session III
Phase 1
Overview prob. ident.
Session III
Phase 2
Small group 1
Small group 2
Small group 3
Panel response
Uses of auxiliary & special area personnel
Grouping of students
Organization of inst. materials
Scheduling
Session III
Phase 3
Record keeping
Rap session
Reporting pupil progress
Impact of teaming
Record keeping
Scheduling
Organization of inst. materials
Impact of teaming
Session III
Phase 4
Curriculum products

PUL WORKSHOP (Continued)


Session IV
Phase 1
Overview
Session IV
Phase 2
IIC meeting
IIC meeting
IIC meeting
IIC meeting
Session V
Evaluation & "rap-up"

PROTOTYPIC THREE-DAY PRE-OPENING OF SCHOOL WORKSHOP

The pre-opening of school workshop is designed to provide the entire staff with a conceptual understanding of IGE. It is also designed to provide time in which the units can begin to prepare their procedures and programs prior to the opening of school. Basic to this strategy are two assumptions: first, the principal and unit leaders or key teachers have attended a three-day staff development workshop; second, the IIC has drafted a preliminary statement of objectives for their IGE curricular area(s).

The introductory phase (1/B) is designed to provide a perspective from which to view the commitment to IGE.

The IGE simulation (1/C) is a method which will provide conceptual understanding of IGE.

Upon the completion of the preliminary activities, the participants should have a conceptual base from which to build the program for their particular school environment.

The second day begins with a crucial activity (2/A)--the establishment of the program objectives. It cannot be stressed enough that the establishment of the objectives is of paramount importance in assuring the success of IGE. Even though the IIC has drafted tentative objectives, they cannot be accepted without an opportunity for the staff to react to them. It will be the total staff's responsibility to accept, modify, add to, or subtract from this rough draft and build it into a form acceptable to the majority of the staff.

The discussion of the staff roles (2/F) is to develop an understanding of each role in the organization. It is extremely important that each staff role be defined in writing. If each staff member understands the roles assumed in the IGE organization, there will be an increase in the competency base of IGE and more effective communication channels.

The remaining time in the workshop is designed to develop procedures suggested in, but not limited to, the tentative agenda. The concluding activity (2/G) brings together the procedures developed by the ICC for building-wide coordination.

THREE-DAY PRE-OPENING OF SCHOOL WORKSHOP AGENDA

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
1/A	LARGE	30 min.	Staff acquaintance--Introduction of total staff and then group	Coffee and rolls
1/B	LARGE	60 min.	Introduction to IGE 1. Oral presentation of MUS history, development, and how this school became involved 2. View "Think Kids"	"Think Kids"
1/C Step 1	LARGE	45 min.	IGE simulation Assessment of: 1. MUS-E Organization and Operations 2. Grouping Patterns 3. Behavioral Objectives 4. Assessment in IGE 5. MUS-E Roles and Responsibilities 6. Instructional Programing Model	1. F/S "MUS-E Organization and Operations" 2. F/S "Grouping Patterns" 3. F/S "Educational Objectives"--James Popham, Vimcet & Associates 4. F/S "Assessment in IGE" 5. F/S "MUS-E Roles and Responsibilties" 6. F/S "Instructional Programing in IGE" 7. Transparencies--"IPM" 8. Simulation booklet
Step 2		six 45-min. time blocks	Students attend instructional time blocks for those areas in which they scored 80% or less	
1/D	LARGE	10 min.	Conclusion and preparation for next day	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
2/A	LARGE	30 min.	IIC panel presentation of the educational program objectives	Copies for everyone
2/B	UNIT	45 min.	Discuss, revise, and/or approve the objectives	
2/C	LARGE	30 min.	Principal presents general school and/or district procedures and policies	Copies of local procedures and policies
2/D	UNIT	30 min.	Discuss procedures and policies	
2/E	LARGE	45 min.	Discuss reactions to objectives, policies, and procedures	
2/F Step 1	LARGE	30 min.	IIC presents a written description of roles and responsibilities for its staff members	1. F/S "MUS-E Roles and Responsibilities" 2. Copies of role descriptions for everyone
Step 2	UNIT	30 min.	Discuss roles and responsibilities of all school personnel	
2/G	UNIT	180 min.	Each unit prepares for the opening of school by developing procedures for: 1. Scheduling--daily, weekly 2. Student grouping 3. Assessment 4. Unit staff specialization 5. Procedures for reporting pupil progress 6. Management of student progress 7. Materials & equipment--use & storage 8. Student orientation 9. Planning time for unit, unit leader, unit member	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
3/A	UNIT	Total day	Continue Day 2, Phase G activities	
3/B	IIC	60 min.	Bring together tentative unit procedures for school-wide coordination	

PROTOTYPIC FIVE-DAY PRE-OPENING OF SCHOOL WORKSHOP

The rationale for the five-day workshop is to provide the basis for competency in IGE and to provide activities that will assist the units in developing procedures and programs for implementing IGE.

The strategy is based on three assumptions: (1) the principal and unit leaders have attended a prior training workshop; (2) the IIC has drafted a preliminary statement of its educational program objectives; and (3) a copy of staff roles and responsibilities is available for each staff member.

The initial introductory activities (1/B) are designed to provide a perspective from which the staff can begin to build their competency in IGE. Following the viewing of "Think Kids," the presentation of the basic organizational pattern of the staff will provide a realistic base from which the IGE program can be built. At this time, a presentation of the week's objectives will give the staff stability and direction as they work through the week's activities.

The IGE simulation (1/C) is a method to provide information about IGE. Upon the completion of these activities the participants will have a conceptual base from which to build their particular IGE program.

At the conclusion of each day's activities an IIC meeting is held. This meeting is vital to the success of the workshop and resultant IGE programs. The first IIC meeting should address itself to a critique of the day's activities and make any needed changes.

The initial activities (2/A) on the second day are designed to begin harmonizing the unit so it can function as an effective group. The unit leader also briefly explains his operational strategy in preparing for the implementation of IGE.

The next activity (2/B) is the presentation of the preliminary statement of the educational program objectives. The units will discuss their reactions to it. No attempt should be made at this point to formulate definite revisions of the objectives. This will be done at a later date when the staff has increased its understanding of IGE.

Activity 2/C is designed to be an intermediate phase between the conceptual base and practical implementation. The 2/C phase brings into perspective the roles within a particular school environment in relation to the implementation of IGE.

The IIC meeting should key in on the suggested agenda items if they have not previously been discussed.

Since there may be many policies and practices over which the local school unit has little or no control, the principal should present them as suggested for the opening of the third day, phase 3/A. This will provide at least some uniform dissemination of information, rather than leaving the staff unaware of district policies or subject to hearsay or misinformation.

At this point in the workshop, 3/B, the staff should have a basic concept of IGE and how it can be implemented. The 3/B phase is designed to pull together the staff's reaction to the preliminary statement of the objectives. It is at this point that they formulate any additions, subtractions, or revisions to the preliminary statement and submit them in writing to the IIC via their unit leader.

The short 3/C activity is to remind the staff that the behavioral objectives are a means to an end and not an end in themselves. The objectives give direction to a unit's activities.

Following the presentation of a general outline of the IGE curricular area(s), phase 3/D, the units begin developing procedures and programs as outlined in 3/E of the suggested agenda. Several items are vital during this phase:

1. Motivation and enthusiasm should increase although frustration may occur.

2. The unit leader should utilize various techniques and materials to increase the participants' understanding of IGE based upon the unit's needs.

3. The suggested agenda items can be altered to fit local needs, but from the experience of many unit leaders, those items should be developed to ensure effective operation.

The IIC activities on Day 3 include the integration of the staff responses to the preliminary draft of the program objectives. The IIC then finalizes the educational program's objectives. It is also necessary to critique carefully the day's activities. This is the first day of formal unit operation, and it is essential that the unit function as successfully as possible.

The activities on the fourth day begin by having the IIC present the finalized statement of objectives. This will remind the staff that they are all working toward a common goal.

The units then continue the activities begun in phase 3/E. By the conclusion of the day, each unit must have prepared the schedule of activities for the first week of school.

The IIC activities include critiquing the day's program and reviewing the activities for the first week of school. This review can answer several questions: Are students oriented sufficiently? Will there be any conflicts in terms of facility usage? Could activities from several units be combined to avoid duplication of activities? Are we ready to begin school?

The final day of the workshop is designed to bring the staff back together. It begins with a postassessment, the purpose of which is to demonstrate to each staff member how much knowledge and understanding he or she has gained.

The IIC then presents to the total staff the activities for the first week of school. The remainder of the day, the units work to finalize their activities in preparation for the opening of school.

That day, the IIC critiques the workshop. It also uses the results of the postassessment to begin developing its yearly inservice program.

FIVE-DAY PRE-OPENING OF SCHOOL WORKSHOP AGENDA

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
1/A	LARGE	30 min.	Staff acquaintance—Introduction of staff and then grouping by units	1. Name tags 2. Coffee and rolls
1/B	LARGE	60 min.	Introduction of IGE 1. Oral presentation of MUS history, development, and how this school became involved 2. View "Think Kids" 3. Oral presentation on the organization of the school 4. Presentation of workshop objectives	"Think Kids"
1/C Step 1	LARGE	45 min.	IGE Simulation Assessment of: 1. MUS-E Organization and Operations 2. Grouping-Patterns 3. Behavioral Objectives 4. Assessment in IGE 5. MUS-E Roles and Responsibilities 6. Instructional Programing Model	1. F/S "MUS-E Organization and Operations" 2. F/S "Grouping Patterns" 3. F/S "Educational Objectives"--James Popham, Vimcet & Associates 4. F/S "Assessment in IGE" 5. F/S "MUS-E Roles and Responsibilities" 6. F/S "Instructional Programing in IGE" 7. Transparencies--"IPM" 8. Simulation booklet
Step 2		six 45-min. time blocks	Students attend instructional time blocks for those areas in which they scored 80% or less	
1/D	LARGE	45 min.	Panel of IIC members answer questions concerning the IGE concept	
1/E	IIC	----------	Critique of day's activities	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
2/A	UNIT	30 min.	1. Unit Orientation (plan an activity to get unit members acquainted with each other) 2. Unit leader distributes operation strategy	
2/B Step 1	LARGE	30 min.	IIC panel presentation of educational program objectives	
Step 2	UNIT	45 min.	Unit discusses the objectives	
2/C	LARGE/UNIT	60 min.	IIC explains staff roles and responsibilities; then break into units for discussion	
2/D	UNIT	Remainder	Each unit begins to prepare for the school year by developing procedures for: 1. Schedules—daily, weekly, yearly; teacher, student, curricular 2. Student grouping 3. Assessment of students 4. Utilization of staff 5. Management of student progress 6. Use and storage of materials and equipment 7. Unit planning procedures 8. Meeting schedule for IIC, unit, individual preparation 9. Student orientation 10. Use of facilities 11. Lunch and recess schedules 12. Preparation of instructional program for IGE curricular area(s) 13. Schedule for first week of school (to be submitted to IIC by Day 5)	1. Access to school and district materials 2. "Performance Objectives"

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
2/E	IIC	---------	1. Guidelines for activities that require school-wide coordination, such as: a. Use of facilities--resource center, gym, etc. b. Lunch and recess schedules c. Meeting of IIC unit, and individual prep time d. Consultant schedules 2. Critique of day's activities	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
3/A	LARGE	30 min.	Principal presents general school and/or district policies over which little local control can be exercised	1. Copies of local district policies 2. School handbook
3/B	UNIT	45 min.	Unit formalizes its response to the objectives, places it in writing, and submits it to IIC	
3/C	LARGE	15 min.	Presentation--the role of Behavioral Objectives	
3/D	LARGE	30 min.	IIC presents outline of the IGE curricular area(s) and general program	
3/E	UNIT	Remainder of day	Continue 2/E activities	Access to school and district materials
3/F	IIC	---------	1. Critique day's activities; adjust agenda if necessary 2. Formalize objectives based on unit's response	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
4/A	LARGE	30 min.	IIC presents finalized objectives	Copies of objectives
4/B	UNIT	Remainder of day	1. Continue activities from 3/E 2. Unit inservice 3. Turn in schedule for first week of school by the end of the day	Copy of schedule for first week of school
4/C	IIC	---------	1. Critique day's activities 2. Review activities for first week of school	

DAY/PHASE	GROUPING PATTERN	APPROXIMATE TIME NEEDED	ACTIVITY	SUGGESTED MATERIALS
5/A	LARGE	45 min.	Postassessment on: a. Behavioral Objectives b. Grouping Patterns c. Assessment in IGE d. Instructional Programing Model e. MUS-E Roles and Responsibilities f. MUS-E Organization and Operations	Assessment from IGE simulation materials
5/B	LARGE	30 min.	IIC presents a schedule of activities for the first day of school	
5/C	UNIT	Remainder of day	Continue activities from 3/E and 4/A	
5/D	IIC	--------	1. Critique 2. Analyze postassessment data as a basis for developing the year's inservice program	

APPENDIX B

Copy of 1972-73 Subcontracts with States

AGREEMENT

(1972-73)

THIS AGREEMENT is entered into as of this ______day of ___________, 1972, by and between the BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (a Wisconsin corporation), hereafter called UNIVERSITY, and ______________________________ as an IGE/MUS-E Implementation Agent and/or Subcontractor, hereafter called AGENCY.

WITNESSETH

WHEREAS, UNIVERSITY has received financial support from the United States Government through funding granted UNIVERSITY's department called WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING, hereafter called CENTER, to implement and maintain Individually Guided Education in Multiunit Elementary Schools, hereafter called IGE/MUS-E, in a nationwide network, and

WHEREAS, UNIVERSITY wishes to engage the AGENCY to implement and maintain IGE/MUS-E.

NOW, THEREFORE, the parties agree as follows:

1. The terms of this agreement shall be in force from the date it is fully executed until May 31, 1973.

2. The CENTER agrees to:

   A. provide financial assistance to the AGENCY in the estimated amount of ___________ for servicing ________ IGE/MUS-E schools (listed in Attachment D) established prior to May 30, 1972, establishing an estimated ______ new IGE/MUS-E schools during the period June 1, 1972 to February 1, 1973, and reporting progress as required by the CENTER. The actual amount of financial assistance provided will be dependent upon the number of new IGE/MUS-E schools established during the period June 1, 1972 to February 1, 1973 and in accordance with the Financial Assistance Formula outlined in Attachment C.

   B. provide the financial assistance specified in paragraph 2.A. above. Progress payments will be made by the CENTER based upon the actual number of new IGE/MUS-E schools established and in accordance with the terms of the following payment schedule:

   1st payment - 25% of the estimated amount specified in 2.A., above, upon receipt of the July 1, 1972 report.

2nd payment - based on the actual number of new schools established, 50% of the amount shown on Attachment C less the amount of the "1st payment". Payment will be made upon receipt of the October 1, 1972 report.

3rd payment - based on actual number of new schools established, 75% of the amount shown on Attachment C less the total amount paid in the first two payments. Payment will be made upon receipt of the February 1, 1973 report.

4th payment - the remaining balance due of the amount shown on Attachment C as determined by the actual number of new schools established during the period June 1, 1972 to February 1, 1973. Amount payable upon receipt of the May 1, 1973 report.

C. plan and coordinate the national IGE/MUS-E network program.

D. plan and conduct workshops during the contract period for coordinators and other personnel from the AGENCY and teacher education institutions who may participate in IGE/MUS-E inservice education and who may provide other services to staffs of local IGE/MUS-E schools.

E. identify and announce the teacher education institutions selected to conduct 1-week workshops for experienced unit leaders, building principals and reading staff teachers of IGE/MUS-E.

F. arrange for the AGENCY and/or local IGE/MUS-E schools to rent or purchase specified inservice audio-visual and printed materials related to IGE/MUS-E and the Wisconsin Design for Reading Skill Development.

G. accept requests for consultant assistance to the AGENCY and to the local IGE/MUS-E schools and to respond positively to such requests within time and budget limitations.

H. provide assistance for the development of IGE/MUS-E instructional, administrative, and related operational skills for personnel in IGE/MUS-E schools established in 1972-73 and in prior years within time and budget limitations. Such assistance will be made available at no charge to the AGENCY and will include planning, scheduling and conducting CENTER sponsored initial and continuing staff development workshops of varying length for IGE/MUS-E administrators, unit leaders, reading staff teachers, reading consultants and aides and interns.

I. enter into no formal staff development workshops or materials service agreements (oral or written) with local schools in the state seeking to implement IGE/MUS-E that have not signed a written agreement with the AGENCY beforehand.

J. encourage local school districts and state agencies to obtain $10 to $20 per child from additional Federal or other funding sources to provide supplementary funds to support new IGE/MUS-E school implementation efforts.

3. AGENCY agrees to:

A. continue to service the _____ IGE/MUS-E schools established prior to May 30, 1972, by providing effective communication channels, assisting in inservice programs and monitoring their progress.

B. install _____ new IGE/MUS-E schools as stipulated in paragraph 2.A above between June 1, 1972 and February 1, 1973.

C. provide to the CENTER a plan of activities and progress reports by the following dates:

July 1, 1972 - a detailed plan of activities for the remainder of the contract period, including a schedule of events, a listing of staff, and a listing of both continuing and newly established participating schools.

October 1, 1972 - an updating of the July report including a description of significant problems encountered by continuing and new IGE/MUS-E schools. This report will include a listing of those continuing schools established prior to May 30, 1972, and a listing of new schools established after May 30, 1972 each listing supported by a statement certifying that the listed schools have been established and are operating as IGE/MUS-E schools. The latter list will be used as the basis for computing progress payments as specified in 2.B., above. Such certification means that each school has (1) completed its pre-opening workshop for staff; (2) organized its building into multiunit design including multiage/grade units and establishment of an Instructional Improvement Committee; and (3) implemented IGE instructional programming in at least one subject-matter area.

February 1, 1972	-	an updating of the October report including a description of significant problems encountered by continuing and new IGE/MUS-E schools. This report will also include a listing of continuing schools and new schools established supported by the certification statement described above.
May 1, 1973	-	a final report summarizing the activities which took place during the contract period.

D. utilize the financial assistance specified in paragraph 2.A to employ personnel to assist in the implementation of IGE/MUS-E schools and to provide support (secretarial, travel, supplies, etc.) related to such efforts as indicated in the attached budget. (Attachment A.)

E. provide sufficient professional staff to supply consultant assistance to participating schools at the recommended minimal level of one full day per school semester.

F. provide supporting services (secretarial, copying/duplicating, etc.) to the staff responsible for the installation and operation of IGE/MUS-E schools.

G. obtain a signed agreement with each cooperating (continuing and new) school district concerning the conditions specified in the Intermediate Implementation Agency-School District Agreement. (See prototype agreement Attachment B). Copies of fully executed agreements shall be forwarded to the CENTER with each report as specified in 3.C above.

H. participate in any United States Office of Education evaluation plan which may be conducted independent of the CENTER.

I. carry out the inservice program following the guidelines for length of institutes and target populations suggested by the Wisconsin Model on a best effort basis.

J. arrange for consultative services to continuing and new IGE/MUS-E schools. This includes preopening and other types of workshops for the entire staff of an IGE/MUS-E school

K. seek to establish cooperative working relationships with teacher education institutions to stimulate their interest in preparing IGE/MUS-E professional personnel and teaching interns for IGE/MUS-E schools. A desirable standard is the placement of no more than two interns per 150 children.

L. stimulate and demonstrate the appropriate use of IGE/MUS-E inservice materials with either the unit staff or with the entire IGE/MUS-E staff during the school year.

M. provide personnel, materials, and program during the second semester 1972-73:

   1. for an intensive 3-day workshop for principals and prospective unit leaders who plan to start IGE/MUS-E schools in 1973-74.

   2. for "regional", 1-day workshops for IGE/MUS-E principals and selected unit leaders (self-help in nature).

N. send the state coordinator and, at the AGENCY's discretion, one other person to the CENTER sponsored institutes for AGENCY personnel specified in paragraph 2.D. of this agreement.

O. identify and select experienced principals, unit leaders, and reading teachers who will attend 1-week IGE/MUS-E workshops specified in paragraph 2.E. during the second semester 1972-73, summer 1973, and thereafter as openings are available. The CENTER will inform each AGENCY of the number of openings to the various workshops as funding is not sufficient to provide for attendance by all experienced personnel.

P. communicate to all schools in the state descriptions of the activities of IGE/MUS-E schools and the nature and substance of IGE/MUS-E workshops through AGENCY bulletins, conferences, in-house publications, and other means.

Q. report to the CENTER in October 1972 and May 1973 any substantial deviations from the agreed upon inservice program that may have occurred.

R. report to the CENTER by May 1, 1973, any difficulties cooperating IGE/MUS-E schools have in meeting the performance objectives as outlined in Chapter 6 of Individually Guided Education and the Multiunit Elementary School.

S. plan with the CENTER coordinator during the second semester 1972-73 for the maintenance of existing IGE/MUS-E schools during 1973-74 and the starting of new schools during 1973-74.

T. encourage the reading consultant of the local school district to work closely with each IGE/MUS-E school that plans to start using the Wisconsin Design for Reading Skill Development during 1972-73.[1]

4. The following provisions of the CENTER's contract with the USOE are hereby made a part of this agreement:

A. PUBLICATIONS:

Any publication resulting from or primarily related to performance under this contract shall contain an acknowledgement in substantially the following form: Published by ____________ ________________________, supported in part by funds from the United States Office of Education, Department of Health, Education and Welfare. The opinions expressed in this publication do not necessarily reflect the position or policy of the Office of Education, and no official endorsement by the Office of Education should be inferred.

B. PRINTING:

Any and all printing, binding and duplicating performed with funds from this subcontract shall be done in accord within the requirements of Government Printing and Binding Regulations No. 20, March, 1969.

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[1] One to four months of planning during a school year by the building staff with inservice assistance from a reading consultant is needed before a school can start using The Wisconsin Design for Reading Skill Development effectively.

C. EXAMINATION OF RECORDS:

The Subcontractor agrees that the Comptroller General or any of his duly authorized representatives, shall, until the expiration of three years after final payment under this agreement, have access to and the right to examine any directly pertinent books, documents, papers and records of the Subcontractor involving transactions related to the agreement.

D. INSPECTION:

The Government, through any authorized representative, has the right, at all reasonable times, to inspect, or otherwise evaluate the work performed or being performed hereunder and the premises in which it is being performed. If any inspection or evaluation is made by the Government on the premises of a subcontractor, the subcontractor shall provide all reasonable facilities and assistance for the safety and convenience of the Government representatives in the performance of their duties. All inspections and evaluations shall be performed in such a manner as will not unduly delay the work.

E. CLEARANCE OF FORMS:

In the event the work performed involves the collection of identical information from ten (10) or more individuals or organizations other than federal employees or agencies, the Subcontractor shall submit to the CENTER six (6) copies of all such questionnaire forms and survey plans for transmittal to the Office of Education for approval prior to their use.

F. COPYRIGHT:

1. The term "materials" as used herein means writings, sound recordings, films, pictorial reproductions, drawings, or other graphic representations, computer programs, and works of any similar nature produced or developed as a part of this contract. The term does not include financial reports, cost analyses and similar information incidental to contract administration.

2. It is the policy of the United States Office of Education that the results of activities supported by it should be utilized in the manner which would best serve the public interest. To that end, except as provided in Paragraph 3, the Subcontractor shall not assert any rights at common law or in equity or establish any claim to statutory copyright in such materials; and all such materials shall be made freely available to the government, the education community and the general public.

3. Notwithstanding the provisions of Paragraph 2 above, upon request of the CENTER, arrangements for copyright of the materials for a limited period of time may be authorized by the Commissioner

of Education, through the Contracting Officer, upon a showing satisfactory to the Office of Education that such protection will result in more effective development or dissemination of the materials and would otherwise be in the public interest.

4. With respect to any materials for which the securing of copyright protection is authorized under Paragraph 3, the parties to this agreement: grant a royalty-free, nonexclusive and irrevocable license to the government to publish, translate, reproduce, deliver perform, use, and dispose of all such materials.

5. To the extent the Subcontractor has the right and permission to do so, the Subcontractor hereby grants to the government a royalty-free, nonexclusive and irrevocable license to use in any manner copyright material not first produced in the performance of this contract but which is incorporated in the materials. The Subcontractor shall advise the CENTER of any such copyrighted material not first produced in the performance of this contract but which is incorporated in the materials. The Subcontractor shall advise the CENTER of any such copyrighted materials known to it not to be covered by such license.

6. In the event that reports shall be published in several parts and at different times, the foregoing provisions shall be applied separately to each part of each report.

G. PATENT RIGHTS:

1. As used in this clause, the term

   (1) "Invention" or "Invention or discovery" includes any art, machine, manufacture, design, or composition of matter, or any new and useful improvement thereof, or any variety of plant, which is or may be patentable under the Patent Laws of the United States of America.

2. Determination of Rights to Inventions made by the Subcontractor shall be made by:

   (1) the Assistant Secretary (Health and Scientific Affairs) who shall have the sole and exclusive power to determine whether or not and where a patent application shall be filed, and to determine the disposition of all rights in such Invention, including title to and rights under any patent application or patent which may issue thereon. The determination of the Assistant Secretary (Health and Scientific Affairs) on all these matters shall be accepted as final.

   (2) the Assistant Secretary (Health and Scientific Affairs) who may, upon the request of the Subcontractor, determine to exercise his option to waive rights to the Invention in foreign countries.

3. The following disclosures and reports on inventions made under the Subcontract shall be furnished to the Subcontractor to the prime contractor:

   (1) A complete written disclosure of each such Invention promptly after conception or first actual or constructive reduction to practice, which ever occurs first under this subcontract.

   (2) Information in writing, as soon as practicable, concerning the date and identity of any public use, sale, or publication of such Invention made by or known to the Subcontractor or of any contemplated publication by the Subcontractor.

   (3) Upon request, such duly executed instruments (prepared by the Government) and such other papers as are deemed necessary to vest in the Government the rights granted it under this clause and to enable the Government to apply for and prosecute any patent application, in any country, covering each Invention where the Government has the right under this clause to file such application.

   (4) Interim reports on the first anniversary of the subcontract where extended or renewed and every year thereafter listing all inventions made during the period whether or not previously reported or certifying that no Inventions were made during the applicable period.

   (5) Prior to final settlement of this subcontract, a final report listing all such Inventions including all those previously listed in interim reports, or certifying that there are no such unreported Inventions.

4. Patent Agreements shall be obtained by:

   (1) The Subcontractor to effectuate the provisions of this clause from all persons who perform any part of the work under this subcontract, except such clerical and manual labor personnel as will have no access to technical data, and except as otherwise authorized in writing by the prime contractor.

5. Payment may be withheld under the subcontract either in the amount of ten percent (10%) of the amount of this subcontract or ten thousand dollars ($10,000), whichever is less, if the Subcontractor fails to furnish the written disclosures for all Inventions as required by paragraph 3(1) or fails to deliver to the prime contractor the interim reports as required by paragraph 3(4) of this clause, or fails to furnish the final report as required by paragraph 3(5), until the subcontractor shall have corrected such failure(s). The withholding of any amount or subsequent payment thereof to the subcontractor under the contract.

6. In the event the subcontractor files a patent application on any Invention made in the course of or under this subcontract, it shall include the following statement in the first paragraph of the specification and in any patent issued thereon:

   > "The Invention described herein was made in the course of, or under, a subcontract with the Wisconsin Research and Development Center for Cognitive Learning, prime contractor with the Department of Health, Education, and Welfare."

H. WORK HOURS STANDARDS ACT - OVERTIME COMPENSATION:

This subcontract, to the extent that it is of a character specified in the Contract Work Hours Standards Act (40 U.S.C. 327-330), is subject to the following provisions and to all other applicable provisions and exceptions of such Act and the regulations of the Secretary of Labor thereunder.

1. Overtime requirements. No subcontractor contracting for any part of the subcontract work which may require or involve the employment of laborers or mechanics shall require or permit any laborer or mechanic in any workweek in which he is employed on such work to work in excess of eight hours in any calendar day or in excess of forty hours in such workweek on work subject to the provisions of the Contract Work Hours Standards Act unless such laborer or mechanic receives compensation at a rate not less than one and one-half times his basic rate of pay all such hours worked in excess of eight hours in any calendar day or in excess of forty hours in such workweek, whichever is the greater number of overtime hours.

2. Violation; liability for unpaid wages; liquidated damages. In the event of any violation of the provisions of paragraph 1, the subcontractor responsible therefore shall be liable to any affected employee for his unpaid wages. In addition, such subcontractor shall be liable to the prime contractor for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic employed in violation of the provisions of paragraph 1 in the sum of $10 for each calendar day on which such employee was required or permitted to be employed on such work in excess of the standard workweek of forty hours without payment of the overtime wages required by paragraph 1.

3. Withholding for unpaid wages and liquidated damages. The prime contractor may withhold from the subcontractor, from

any moneys payable on account of work performed by the subcontractor, such sums as may administratively be determined to be necessary to satisfy any liabilities of such subcontractor for unpaid wages and liquidated damages as provided in the provisions of paragraph 2.

4. Subcontracts. Subcontracts shall insert paragraphs 1 through 4 of this clause in all subcontracts, and shall require their inclusion in all subcontracts of any tier.

5. Records. The subcontractor shall maintain payroll records containing the information specified in 29 CFR (516.2[a]). Such records shall be preserved for three years from the completion of the subcontract.

I. EQUAL OPPORTUNITY:

1. The subcontractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The subcontractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The subcontractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

2. The subcontractor will, in all solicitations or advertisements for employees, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin.

3. The subcontractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or workers' representative of the subcontractor(s) commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

4. The subcontractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

5. The subcontractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

6. In the event of the subcontractor(s) noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this subcontract may be cancelled, terminated or suspended in whole or in part and the subcontractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

7. The subcontractor shall submit three (3) copies of its affirmative action plans to the prime contractor within 120 days of the date of this subcontract unless exempt under the rules and regulations of the Secretary of Labor (Section 204, Executive Order 11246, September 24, 1965).

J. CERTIFICATION OF NONSEGREGATED FACILITIES:

The Subcontractor certifies that it does not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not permit its employees to perform their services at any location, under its control, where segregated facilities are maintained. The Subcontractor certifies further that it will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it will not permit its employees to perform their services at any location, under its control, which segregated facilities are maintained. The Subcontractor agrees that a breach of this certification is a violation of the Equal Opportunity clause in this contract. As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash rooms, restaurants and other eating areas, time clocks, locker room, and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom, or otherwise. The Subcontractor further agrees that (except where it has obtained identical certifications from proposed subcontractors for specific time periods) it will obtain identical certifications from any subcontractors prior to the award of subcontracts exceeding $10,000 which are not exempt from the provisions of the Equal Opportunity clause; that it will retain such certifications in its files; and that it will forward the following notice to such proposed subcontractors (except where the proposed subcontractors have submitted identical certifications for specific time periods).

NOTE: The penalty for making false statements is prescribed in 18 U.S.C. 1001.

Accepted by:

Board of Regents of the University of Wisconsin System

Ralph Farnsworth
Director, U.W. Purchasing

State of

Herbert J. Klausmeier
Director, Wisconsin Research and Development Center for Cognitive Learning

Date

Date

ATTACHMENT A

BUDGET

- PERSONNEL COMPENSATION
  - Salaries and Wages
  - Personnel Benefits
  - Consultant Fees
- TRAVEL AND PER DIEM
- RENT AND UTILITIES
- COMMUNICATIONS
- PRINTING AND REPRODUCTION
- OTHER SERVICES
  - Equipment Rental
  - Data Processing
  - Other
- SUPPLIES
- EQUIPMENT
- INDIRECT COSTS

TOTAL

ATTACHMENT B

PROTOTYPE

MEMORANDUM OF AGREEMENT BETWEEN INTERMEDIATE IMPLEMENTATION AGENCY AND ITS PARTICIPATING SCHOOL DISTRICTS TO IMPLEMENT IGE/MUS-E

A. The term of this agreement shall be in force from the date it is fully executed until May 31, 1973.

B. The Intermediate Implementation Agency agrees to:

1. conduct three-day workshops for principals and prospective unit leaders for IGE/MUS-E implementation during 1972-73.
2. provide consultative help of at least one-half day per month per participating school during the first two years of program implementation. This includes consultative help for two 1-day (or half-day equivalents) inservice sessions for the staff of each IGE/MUS-E.
3. encourage each building staff to use inservice materials appropriately.
4. assist in securing interns and/or student teachers from cooperating universities for school systems desiring them.
5 provide for communication (newsletter or other forms) among multi-unit schools, teacher-education institutions, and other appropriate agencies.

C. The Participating School District agrees to:

1. assess present teachers and other school personnel relative to their inclusion in a multiunit school program.

2. make necessary arrangements to include only compatible staff members in each unit and school. Allow those who do not wish to participate to transfer without prejudice to another building.
3. designate one person in the district to be responsible for successful operation of IGE/MUS-E's.
4. provide funds for staff to attend necessary workshops and inservice programs.
5. implement a well-planned local inservice education program to retrain staff. It is strongly recommended that during the second semester the principal and unit leaders conduct an inservice program. Minimum amounts of time which are recommended to develop the multiunit elementary school concept are listed below:

February	4 hours	April	4 hours
March	4 hours	May	4 hours

   Each school may determine its wishes to hold sessions once a week, twice a month, once a month, or once every alternate month to achieve the minimum amount of time.
6. hold a 3-5 day workshop for the staff of each building in late August or early September for the purpose of developing IGE in one subject matter area.
7. hold two 1-day (or 4 one-half day equivalent) workshops for the staff of each building during the school year.
8. implement IGE/MUS-E as specified below in _____ schools:
   a. Organize a complete building in multiunit design to include:
      (1) Multi-age/grade units.
      (2) Aide(s) for each unit (voluntary or paid).
      (3) Unit leaders, with released time for planning.

(4) Establish an Instructional Improvement Committee (IIC) and delegate decision-making powers related to instruction to them. Make provisions to the IIC to meet regularly each week.

(5) Provide 3-5 hours of instructional unit (cooperative team) planning time per week and during the school day.

b. Curriculum

(1) Implement IGE instructional programming in at least one subject-matter area during the first year of implementation.

(2) Grant each building permission to use appropriate instructional materials and assessment procedures in IGE subject-matter areas, based upon needs of their children, that include these components:

(a) Performance objectives

(b) Assessment for objectives

(c) Diversified learning activities

(d) Post-assessment and evaluation

c. Parent Communication

(1) Implement a planned program of parent communication

9. develop (through encouragement by Central Office) greater flexibility in relation to materials, time, space, funds and personnel.

10. participate in any U. S. Office of Education evaluation plan to be conducted in relation to IGE/MUS-E.

11. report to the Intermediate Implementation Agency in early October 1972 and May 1973 any substantial deviations from the agreed upon inservice program that may have occurred.

12. report to the Intermediate Implementation Agency by April 15, 1973 any difficulties experienced in meeting performance objectives.

Accepted by:

Intermediate Implementation Agency	School District
Authorized Signature	Authorized Signature
Title	Title
Date	Date

DGW:bat
1/19/72

ATTACHMENT C

FINANCIAL ASSISTANCE FORMULA

No. of New Schools Established	Amount of Financial Assistance
0-14	-0-
15	$15,000
16	16,000
17	17,000
18	18,000
19	19,000
20-29	20,000
30-39	24,000
40 and over	28,000

APPENDIX C

Copies of 1973-74 Subcontract and 1974-75 Subcontract

MEMORANDUM OF AGREEMENT
(1973-74)

THIS AGREEMENT is entered into as of the 2nd day of August, 1973, by and between the BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (a Wisconsin corporation), hereafter called UNIVERSITY, and the Minnesota State Department of Education, Division of Instruction, Elementary and Secondary Education Section, as an IGE/MUS-E Implementation Agent, hereafter called AGENCY.

WITNESSETH

WHEREAS, UNIVERSITY has received financial support from the United States Government through funding granted UNIVERSITY's department called WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING, hereafter called CENTER, to nationally implement, maintain and refine Individually Guided Education in Multiunit Elementary Schools, hereafter called IGE/MUS-E, by the establishment and maintenance of State IGE/MUS-E Networks, and

WHEREAS, UNIVERSITY wishes to engage the AGENCY to establish and/or maintain a State IGE/MUS-E Network to implement, maintain, and refine IGE/MUS-E in schools,

NOW, THEREFORE, the parties agree as follows:

I. The terms of this Agreement shall be in force from the date it is fully executed until September 30, 1974.

II. The CENTER agrees to:

A. Provide financial assistance in the amount of five thousand dollars ($5,000) to the AGENCY for the period of this Agreement for the purpose of establishing and/or maintaining a State IGE/MUS-E Network to implement, maintain, and refine IGE/MUS-E in schools. An initial payment in two thousand five hundred dollars ($2,500) to the AGENCY will be due on September 1, 1973, upon receipt of an invoice and the documents specified in III.I.1., and a final payment of two thousand five hundred dollars ($2,500) to the AGENCY will be due on September 1, 1974, upon receipt of an invoice and the document specified in III.I.2.

B. Participate in efforts to establish a National Organization of State IGE/MUS-E Networks.

C. Provide training opportunities in the form of leadership workshops for representatives of the State IGE/MUS-E Networks. In this regard, the CENTER proposes to conduct four (4) one-week leadership workshops on the Madison campus between July 1, 1973, and September 1, 1974. A maximum of 75 participants will attend each workshop. The CENTER will provide financial support to participants to allay travel and living costs.

D. Provide consultation services to the AGENCY as required. On-site consultation will be limited to one visit during the period of this agreement.

E. Maintain a cooperative relationship with the University of Wisconsin Sears Roebuck Foundation Project in working with the State IGE/MUS-E Network.

III. The AGENCY agrees to:

A. Form and identify members of a State IGE/MUS-E Network that will include the following participating member groups:

1. The state education agency,
2. One or more teacher education institutions,
3. One or more large school districts of Minnesota,
4. One or more small school districts of Minnesota.

B. Invite and encourage participation in the State IGE/MUS-E Network by other organizations, such as:
   1. State teacher organizations,
   2. State elementary school principals association,
   3. State Parent-Teacher Organization,
   4. Other state groups with a direct interest in elementary education.

C. Ensure that each member group appoints one person as a representative to the State IGE/MUS-E Network.

D. Ensure that a State IGE/MUS-E Network chairperson, executive secretary, or similar role will be appointed and that such person will be identified to the CENTER.

E. Ensure that one or more individuals will be selected to represent the State IGE/MUS-E Network in the National Organization of State IGE/MUS-E Networks.

F. Ensure that participating member groups will meet and define the roles and responsibilities of each group in the operation of the State IGE/MUS-E Network to provide for complete compliance with the Center's IGE/MUS-E implementation model.

G. Ensure that each participating member group in the State IGE/MUS-E Network will accomplish one or more of the following efforts, so that all of the following efforts are accomplished by the Network during the period of this agreement:
   1. Plan and implement the installation of new IGE/MUS-E schools,
   2. Plan and start a maintenance and refinement program,
   3. Plan a preservice (undergraduate) teacher education program including IGE/MUS-E concepts and practices,
   4. Plan a graduate program for unit leaders for IGE/MUS-E schools,

5. Plan a graduate program to prepare elementary principals for IGE/MUS-E schools.

H. Provide continuing effort to increase the number of participating member groups in the State IGE/MUS-E Network.

I. Furnish the CENTER the following reports:

1. Prior to September 1, 1973,

    a. A line item budget to support the $5,000 specified in II.A.

    b. A planning document covering the period of the agreement. The plan should include but not be limited to projections as to the numbers of each type of participant involved in the State IGE/MUS-E Network and the roles and responsibilities of each.

2. Prior to September 1, 1974,

    a. A final report which summarizes all activities specified in Section III of this agreement that were accomplished during the year. This report should also include plans for subsequent years and recommended changes to approach and operation to improve the IGE/MUS-E Network model.

J. Utilize the financial assistance provided by the CENTER for State IGE/MUS-E Network purposes only and limited to expenses other than salaries, such as travel, communications, supplies, services, honoraria, and conferences.

IV. This Agreement is subject to cancellation by the UNIVERSITY in the event funding from the United States Government is withdrawn or otherwise not available to the CENTER.

Agreed to:

Board of Regents of the
University of Wisconsin System

Ralph Farnsworth
Director, Purchasing

Richard A. Rossmiller, Director
Wisconsin Research and Development
Center for Cognitive Learning

Date

Agreed to:

Howard B Casmey

Howard B. Casmey, Commissioner
Minnesota Department of Education

Richard J Mesenburg

Richard J. Mesenburg
State IGE Coordinator
Minnesota Department of Education

Aug 17 1973

Date

PROTOTYPE STATE IGE NETWORK SUBCONTRACT*

(1974-75)

SUBCONTRACT # __________

Between

THE BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM

and

____

Under

PRIME CONTRACT NE-C-00-3-0065

This SUBCONTRACT is entered into as of this ___ day of ______________________, 1974 by and between the BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM (a Wisconsin corporation), hereafter called UNIVERSITY, and ________________ ____________________________________ as an implementation agency, hereafter called AGENCY.

WITNESSETH

WHEREAS, UNIVERSITY, in behalf of the WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING, hereafter called CENTER, has received financial support from the National Institute of Education through Prime Contract NE-C-00-3-0065 to implement nationally Individually Guided Education, hereafter called IGE, by the establishment and maintenance of state IGE networks and regional IGE centers and by conducting leadership workshops, and

WHEREAS, UNIVERSITY wishes to engage the AGENCY to establish and maintain a state IGE network to implement, maintain, and refine IGE in schools.

NOW, THEREFORE, the parties agree as follows:

I. The effective period of this subcontract will be from the date it is fully executed until June 30, 1975, unless otherwise provided for by modification to this subcontract.

II. The CENTER agrees to:

---

*Subject to approval by the National Institute of Education and the State of Wisconsin

A. Provide financial assistance in the amount of ____________________ ____________________________________ to the AGENCY for the period of this subcontract for the purpose of establishing and/or maintaining a state IGE network to implement, maintain, and refine IGE in schools.

1. an initial payment of ______________________________ to the AGENCY will be due on _______________________, 1974, upon receipt by the CENTER of an invoice and the documents specified in III.J.1.,
2. an interim payment of ____ ____________ to the AGENCY will be due on February 1, 1975, upon receipt by the CENTER of an invoice and an interim report as specified in III.J.2., and
3. a final payment of ____ _______ to the AGENCY will be due on June 30, 1975, upon receipt by the CENTER of an invoice and a final report as specified in III.J.3.

B. Provide training opportunities in the form of leadership workshops for representatives of the state IGE network. In this regard, the CENTER, in cooperation with the UW/SRF IGE Teacher Education Project, proposes to conduct a series of leadership workshops between July 1, 1974 and December 31, 1975 as follows:

1. three for Multiunit School-Elementary (MUS-E) implementors
2. three for Individually Guided Education (IGE) teacher educators
3. three for Individually Guided Motivation (IGM) implementors
4. five for Wisconsin Design for Reading Skill Development (WDRSD) implementors

C. Allocate participation by representatives of the state IGE network for each of the above mentioned series of leadership workshops as follows:

1. three positions for MUS-E workshops
2. three positions for IGE teacher educator workshops
3. three positions for IGM workshops
4. two positions for WDRSD workshops

The CENTER will provide a stipend of $100 per position for workshops 1, 3, and 4 (above) to help defray the expenses for persons attending the workshops. It is understood by the parties that stipends to help defray the expenses for persons attending workshop 2 above will be provided by the UW/SRF IGE Teacher Education Project.

D. Host a one-day meeting in the fall of 1974 for three representatives of the State IGE Coordinating Council (SICC) in Madison and support the travel, lodging, and meal expenses for one representative from the SICC. The purpose of such meeting is to confer with CENTER staff and others relative to the progress in organization and programs of the state IGE network.

E. Conduct, in cooperation with the UW/SRF IGE Teacher Education Project, a three-day spring 1975 workshop for at least three representatives from each SICC; such workshop will be for all state IGE network SICCs and focus on such matters as continued planning, exchange of ideas and experiences, and identification of problems and possible resolutions. The CENTER will provide a $100 stipend per attendee to help defray the expenses of travel, lodging, and meals for each of three representatives from each SICC.

F. Provide two days of consulting to the state IGE network. Such consultation may be utilized for assistance in running awareness conferences, principal-unit leader workshops, maintenance-refinement workshops, and consultation with the SICC, Regional IGE Coordinating Councils (RICCs), teacher education groups, and/or planning task forces.

G. Conduct two on-site visits to meetings of the SICC by a member of the CENTER staff.

H. Establish four regional IGE centers, in teacher education institutions located in various parts of the country. Such regional IGE centers will provide assistance (at cost) to state IGE networks through such means as conducting leadership workshops and consulting services. Each regional IGE center will have an advisory board comprised, in part, of representatives from each of the SICCs in the respective regions.

I. Annually publish a national state IGE network directory and a directory of IGE schools.

J. Maintain a cooperative relationship with the University of Wisconsin Sears-Roebuck Foundation IGE Teacher Education Project in working with the state IGE network.

III. The AGENCY agrees to:

A. Form and identify members of a state IGE network that will include the following participating member groups:

1. the state education agency
2. one or more teacher education institutions
3. one or more intermediate education agencies, if appropriate
4. one or more local education agencies

B. Invite and encourage participation in the state IGE network by other organizations, such as:

1. state teacher organizations
2. state elementary school principals association

3. state parent-teacher organization
4. other state groups with a direct interest in elementary education

C. Organize Regional IGE Coordinating Councils (RICCs) and a State IGE Coordinating Council (SICC) as outlined in A Manual for Starting and Maintaining State IGE Networks.

D. Identify to the CENTER by November 15, 1974 the SICC chairperson, RICC chairperson, an SICC executive secretary or similar role who will serve as state IGE coordinator, the coordinators for each RICC, local education agency IGE coordinator, and a current list of IGE schools in the state IGE network.

E. Ensure that the state IGE network will apply for membership in the State IGE Network Division of the national Association for Individually Guided Education (AIGE).

F. Ensure that participating member groups will meet and define the roles and responsibilities of each group in the operation of the state IGE network to provide the complete compliance with the CENTER's IGE implementation model as outlined in A Manual for Starting and Maintaining State IGE Networks.

G. Ensure that each participating member group in the state IGE network will accomplish one or more of the following activities, so that all of the following efforts are accomplished by the state IGE network during the period of this subcontract:

1. carry out the requisite activities to assist at least _______ schools in making the changeover to IGE
2. plan and carry out appropriate inservice activities to help all _______ existing IGE schools maintain and refine the implementation of IGE
3. provide assistance to at least one teacher education institution in planning a preservice (undergraduate) teacher education program including IGE concepts and practices
4. provide assistance to at least one teacher education institution in planning a graduate program for unit leaders and staff teachers for IGE schools
5. provide assistance to at least one teacher education institution in planning a graduate program to prepare elementary principals and other school administrators for IGE schools

H. Provide continuing effort to increase the number of participating member groups in the state IGE network.

I. Utilize the financial assistance provided by the CENTER for state IGE network purposes only and limited to expenses (other than salaries) such as travel, communications, supplies, services, honoraria, and conferences.

J. Furnish the CENTER the following documents and reports:

   1. Prior to September ___, 1974,

      a. a line item budget (see Appendix C) to support the $7,500 specified in II.A.
      b. a planning document covering the period of the subcontract. The plan should include, but not be limited to:

         1) projections as to the numbers of each type of participating agency to be included in the state IGE network and the roles and responsibilities of each
         2) identification of the prospective member agencies and their representatives
         3) identification of agencies which will carry out the activities identified in III.G.1-5
         4) timelines when the activities in III.G.1-5 will be carried out
         5) projected estimates of the dollar value contributions of member agencies to the activities specified above

   2. Prior to February 1, 1975,

      a. an interim progress report related to the activities specified in the initial planning document specified in III.J.1.

   3. Prior to June 30, 1975,

      a. a final report which summarizes all activities specified in section III of this subcontract that were accomplished during the year and including a cost benefits analysis based upon the funds provided by the CENTER and the dollar value contributions of participating agencies and individuals. This report should also include plans for subsequent years and recommended changes in organizing and operating the state IGE network.

K. Send the number of persons specified in II.C. to the leadershi workshops specified in II.B. above.

L. Send at least three representatives from the SICC to the fall meetings in Madison, Wisconsin as specified in II.D. above. The representatives shall be from the state education agency, a teacher education institution, and a local education agency.

M. Send at least three representatives to the spring workshop specified in II.E. above.

N. Participate on the appropriate regional IGE center's advisory board.

IV. In the event the AGENCY elects to designate another educational organization as the agent to coordinate and be responsible for the fiscal responsibilities associated with this subcontract and the state IGE network, indicate below the name and address of the institution so designated, as well as the name of the responsible individual:

____
Responsible Person

____
Agency

____
Street

____
City/State/Zip

V. The following Special Provisions attached (Appendix A) of the Prime Contract are hereby incorporated into this subcontract:

A. Article VIII - Income
B. Article IX - Federal Reports Act
C. Article XI - Warranty Against Dual Compensation
D. Article XII - Services of Consultants

VI. The following clauses of the Prime Contract General Provisions, HEW form 315 Rev. 12/72, are attached (Appendix B) and are hereby incorporated into this subcontract:

A. Clause No. 7 - Examination of Records
B. Clause No. 14 - Termination
C. Clause No. 15 - Rights in Data
D. Clause No. 20 - Patent Rights
E. Clause No. 30 - Contract Work Hours Standard-Overtime Compensation
F. Clause No. 32 - Equal Opportunity

Any reference in the Special or General Provisions to the word Contractor or Grantee for purposes of this subcontract shall mean AGENCY and reference to the words Government, Contracting Officer or his duly authorized representative and Grants Office shall be deemed to mean the UNIVERSITY.

This subcontract shall become effective and shall be binding upon the parties hereto, their successors and assigns upon due execution by both parties.

Agreed to:

Board of Regents of the
University of Wisconsin System

____
Robert W. Erickson, Director
Research Administration-Financial

____
Date

____
Ralph Farnsworth
Director, Purchasing

____
Date

____
Richard A. Rossmiller, Director
Wisconsin Research and Development
Center for Cognitive Learning

____
Date

Agreed to:

____
AGENCY

____
Name

____
Title

____
Date

APPENDIX C

BUDGET SHEET

Travel of network officers, respresentatives, and consultants

Transportation $____________________

Meals and Lodging $____________________

Communications

Telephone $____________________

Postage $____________________

Printing and Reproduction

Printing $____________________

Copying $____________________

Supplies and Materials $____________________

Conference Expenses

Conference room rental $____________________

Food (coffee, rolls, etc.) $____________________

Secretarial Assistance $____________________

Honoraria for Consultants* $____________________

Contingency (not more than 5% of total) $____________________

TOTAL $____________________

---

*The R & D Center pays $100 per day plus expenses to its consultants.

APPENDIX C

EXPENDITURE REPORT

	Budgeted	Expended	Balance
Travel of network officers, representatives, and consultants			
Transportation	$	$	$
Meals and Lodging	$	$	$
Communications			
Telephone	$	$	$
Postage	$	$	$
Printing and Reproduction			
Printing	$	$	$
Copying	$	$	$
Supplies and Materials	$ $	$	$
Conference Expenses			
Conference room rental	$	$	$
Food (coffee, rolls, etc.)	$	$	$
Secretarial Assistance	$	$	$
Honoraria for Consultants*	$	$	$
Contingency (not more than 5% of total)	$	$	$
TOTALS	$	$	$

*The R & D Center pays $100 per day plus expenses to its consultants.

APPENDIX D

Copy of Memorandum of Agreement with 14 States

MEMORANDUM OF UNDERSTANDING BETWEEN THE WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING AND AN ESTABLISHED STATE IGE NETWORK

This MEMORANDUM OF UNDERSTANDING is entered into as of this _____ day of _________________________________, 1974 by and between the WISCONSIN RESEARCH AND DEVELOPMENT CENTER FOR COGNITIVE LEARNING, hereafter called CENTER, and ____ as an IGE implementation agency, hereafter called AGENCY.

WITNESSETH

WHEREAS, CENTER has received financial support from the United States Government to implement Individually Guided Education, hereafter called IGE, nationally by the establishment of state IGE networks and regional IGE centers and through conducting leadership workshops, and

WHEREAS, CENTER wishes the AGENCY to assume the leadership in maintaining and refining the state IGE network in ____,

NOW, THEREFORE, the parties agree as follows:

I. This MEMORANDUM OF UNDERSTANDING is in force from September 30, 1974 until December 31, 1975

II. The CENTER agrees to:

A. Conduct, in cooperation with the University of Wisconsin Sears-Roebuck Foundation IGE Teacher Education Project, a series of leadership workshops as follows:

1. three for Multiunit School-Elementary (MUS-E) implementors
2. three for Individually Guided Education (IGE) teacher educators
3. three for Individually Guided Motivation (IGM) implementors
4. five for Wisconsin Design for Reading Skill Development (WDRSD) implementors

B. Allocate participation by representatives of the state IGE networks for each of the above mentioned series of leadership workshops as follows:

1. three positions for MUS-E workshops
2. three positions for IGE teacher educator workshops
3. three positions for IGM workshops
4. two positions for WDRSD workshops

The CENTER will provide a stipend of $100 per position for workshops 1, 3, and 4 (above) to help defray the expenses for persons attending the workshops. It is understood by the parties that stipends to help defray the expenses for persons attending workshop 2 above will be provided by the UW/SRF IGE Teacher Education Project.

C. Host a one-day meeting in the fall of 1974 for three representatives of the State IGE Coordinating Council (SICC) in Madison and support the travel, lodging, and meal expenses for one representative from the SICC. The purpose of such meeting is to confer with CENTER staff and others relative to the progress in organization and programs of the state IGE network.

D. Conduct, in cooperation with the UW/SRF IGE Teacher Education Project, a three-day spring of 1975 workshop for at least three representatives from each SICC; such workshop will be for all state IGE network SICCs and focus on such matters as continued planning, exchange of ideas and experiences, and identification of problems and possible resolutions. The CENTER will provide a $100 stipend per attendee to help defray the expenses of travel, lodging, and meals for each of three representatives from each SICC.

E. Provide two days of consulting to the State IGE Network. Such consultation will not be for assistance in running awareness conferences, principal-unit leader workshops, or maintenance-refinement workshops; rather, consultation will be available for meetings or workshops for the SICCs, the Regional IGE Coordinating Councils (RICCs), teacher education groups, and/or planning task forces.

F. Conduct two on-site visits by a member of the CENTER staff to meetings of the SICC.

G. Establish four regional IGE centers, in teacher education institutions located in various parts of the country. Such regional IGE centers to provide assistance (at cost) to state IGE networks through such means as conducting leadership workshops and consulting services. Each regional IGE center will have an advisory board comprised, in part, of representatives from each of the SICCs in the respective regions.

H. Annually publish a national state IGE network directory and a directory of IGE schools.

I. Maintain a cooperative relationship with the UW/SRF IGE Teacher Education Project in working with the state IGE network.

III. The AGENCY agrees to:

A. Send persons specified in II.B. to each of the leadership workshops in II.A. above.

B. Send at least three representatives from the SICC to the fall meetings in Madison, Wisconsin as specified in II.C. above. The representatives shall be from the state education agency, a teacher education institution, and a local education agency.

C. Send at least three representatives to the spring workshop specified in II.D. above.

D. Submit to the CENTER by October 30, 1974 the plans of the state IGE network for implementing IGE in the state and including an estimate of the dollar value of the contributions of member agencies to the activities specified in the plans, and report on February 1, 1975 and August 1, 1975 the progress of the state IGE network in organizing the network and in carrying out its implementation plans; reports submitted to comply with UW/SRF requirements will satisfy this requirement.

E. Participate on the appropriate regional IGE center's advisory board.

F. Establish an SICC and RICCs as described in A Manual for Starting and Maintaining State IGE Networks including representation from the state education agency, one or more teacher education institutions, one or more intermediate education agencies (if appropriate) and local education agencies.

G. Provide information about the activities of the state IGE network in each of the four phases of implementation and a cost-benefits analysis based on the dollar value of the contribution of the various agencies in the state IGE network. Such information will be provided through a visit or phone call during the last two months of this Memorandum of Understanding so that the CENTER can complete a required final report on the total scope of activities in the project.

H. Identify to the CENTER by November 15, 1974 and November 15, 1975 the SICC chairperson, RICC chairpersons, an SICC executive secretary or similar role who will serve as state IGE coordinator, the coordinators for each RICC, local education agency IGE coordinator, and a current list of IGE schools in the state IGE network.

Agreed to:	Agreed to:
Richard A. Rossmiller, Director Wisconsin Research and Development Center for Cognitive Learning	State IGE Coordinating Council Chairperson
James E. Walter, Director of Implementation for the Wisconsin Research and Development Center for Cognitive Learning	Agency which the SICC Chairperson Represents
Date	Date

APPENDIX E

Copy of Instrument Used to Conduct Telephone Survey

QUESTIONNAIRE FOR STATE COORDINATORS (14 INITIAL STATES)

STATE ______________________

DATE ______________________

1. Are there any questions regarding the Memorandum of Agreement?

2. Who will sign the Memorandum of Agreement?

3. By what date can we expect it to be signed?

4. Has the August 1974 report to the UW/SRF project been submitted? If not, when can we expect it? (This report will satisfy the requirements of the R & D Center's subcontract with your state.)

5. Did you have any "carry over funds"?

   How much? ______________________

   Did you carry out your original plans? (Handle this question with tact--non-threatening!)

   If not, why?

6. What is the progress of your plans since Indianapolis?

   Outcome 1

   Outcome 2

   Outcome 3

   Outcome 4

   Outcome 5

Questionnaire for State Coordinators
(14 Initial States)

7. What kind of assistance do you need from the R & D Center?

8. Do you plan to use all of the stipends allocated to your state?

(a) 3 Stipends for MUS-E ($150)

February - Tampa

April - Denver

October - St. Louis

(b) 3 Stipends for Teacher Educator ($150)

January - San Jose

June - Hartford

August - Madison

(c) 3 stipends for IGM ($100)

March - Columbus

June - Salt Lake City

(d) 2 Stipends for WDRSD ($100)

November - Atlanta

February - San Francisco

April - Washington, D.C.

May - Madison

9. (a) Will there be any representatives from your state who can attend a teacher educator workshop to be held in San Jose, California in mid-January 1975?

Questionnaire for State Coordinators
(14 Initial States)

(b) Will there be any representatives from your state who can attend an implementors' workshop to be held in Tampa, Florida in mid-February 1975?

10. What date(s) would be most convenient for three representatives from your SICC to attend the one-day planning meeting in Madison during the months of November, December, and January (1975)? The R & D Center will pay the full expenses of one person for this meeting.

1st choice ____________________________

2nd choice ____________________________

3rd choice ____________________________

11. Have you made any modification on the prototypic sequence of inservice activities? (See model on p. 47, State Network Manual)

12. What are the activities and sequence?

13. When (months)?

14. Did you add anything?

15. What would be a convenient date for R & D Center staff to visit an SICC meeting in your state?

January 1975

March 1975

February 1975

GPO 810-034-6

16. When do you plan to be running the following implementation activities (get dates)?

(a) Awareness, or clue-in, or overview

(b) Principal-Unit Leader workshop or two-week clinicals

17. In how many new schools do you plan to implement IGE/MUS-E?

During 1974-75 ____________________

During 1975-76 ____________________

APPENDIX F

Examples of Credit and Inservice IGE Courses Provided by Teacher Education Institutions

EXAMPLES OF CREDIT AND INSERVICE COURSES IN IGE

Various professors have organized modules, courses, and descriptions of their total programs dealing with IGE. The professors listed below can make a particular outline available to you upon request. We hope that teacher educators will keep in touch with one another in developing offerings related to IGE.

Professor	Title & Kind of Course	Time Offered	Students Enrolled
Fred Anderson Black Hills State College Spearfish, SD 57783	Individually Guided Education 3 credits	Ac. Year	Undergrad/ Graduate Inservice
Naomi Spaulding Black Hills State College Spearfish, SD 57783	Introduction to IGE 1 credit	Sum. Sess.	Undergrad/ Graduate
Naomi Spaulding Black Hills State College Spearfish, SD 57783	Clinical in IGE 1 credit	Sum. Sess.	Undergrad/ Graduate Inservice
Jerry Hauge Dakota State College Madison, SD 57042	Clinical in IGE 2 credits	Ac. Year	Inservice
Bill Knox Dakota State College Madison, SD 57042	Curriculum: Individually Guided Educ. 2 credits	Ac. Year/ Sum. Sess.	Undergrad
Warren Kallenbach San Jose State University San Jose, CA 95192	Wisconsin Design Reading Workshop 1 credit	Sum. Sess./ Ac. Year	Inservice
Warren Kallenbach San Jose State University San Jose, CA 95192	Practicum in IGE Materials Preparation 4 credits	Sum. Sess./ Ac. Year	Inservice
Warren Kallenbach San Jose State University San Jose, CA 95192	Workshops for Principals in IGE Schools 1 credit	Sum. Sess./ Ac. Year	Inservice
Warren Kallenbach San Jose State University San Jose, CA 95192	Workshop in IGE 3 credits	Sum. Sess./ Ac. Year	Inservice

Professor	Title & Kind of Course	Time Offered	Students Enrolled
Warren Kallenbach San Jose State University San Jose, CA 95192	Advanced Workshop in IGE 3 credits	Sum. Sess./ Ac. Year	Inservice
Warren Kallenbach San Jose State University San Jose, CA 95192	Practicum in IGE Materials Preparation 6 credits	Sum. Sess./ Ac. Year	Inservice
Warren Kallenbach San Jose State University San Jose, CA 95192	Personalizing Instruction in Learning	Ac. Year	Undergrad/ Graduate
Weldon Parker San Jose State University San Jose, CA 95192	Developing Mathematical Processes Workshop 1 credit	Sum. Sess./ Ac. Year	Inservice
William Bechtol Southwest Minnesota State College Marshall, MN 56258	Performance Objectives Cluster 1 credit	Ac. Year	Undergrad
Judy Mohr Southwest Minnesota State College Marshall, MN 56258	Secondary Education Program: Module I: So You Want to Teach	Ac. Year	Undergrad
Mark S. Brown University of Hartford West Hartford, CT 06117	Implementation of IGE 3 credits	Ac. Year/ Sum. Sess.	Graduate
Cleo Kosters University of South Dakota Vermillion, SD 57069	Seminar in IGE 3 credits	Ac. Year	Undergrad/ Graduate Inservice
Joan Inglis University of Toledo Toledo, OH 43606	Developing IGE/MUS-E in North Central Ohio--two week institute	Sum. Sess.	Inservice

Professor	Title & Kind of Course	Time Offered	Students Enrolled
Lloyd Joyal, Max Poole, Juanita Sorenson University of Wisconsin Eau Claire, WI 54701	Intro. to IGE 3 credit course	Ac. Year/ Sum. Sess.	Undergrad/ Graduate
Lloyd Joyal, Juanita Sorenson University of Wisconsin Eau Claire, WI 54701	Individually Guided Motivation 3 credit course	Ac. Year/ Sum. Sess.	Graduate
Lloyd Joyal, Juanita Sorenson University of Wisconsin Eau Claire, WI 54701	Differentiated Staff.: A Support System for IGE 3 credit course	Ac. Year/ Sum. Sess.	Graduate
Herbert J. Klausmeier University of Wisconsin Madison, WI 53706	Individually Guided Motivation 1 credit module	Ac. Year	Undergrad/ Inservice
James Lipham, Marvin Fruth University of Wisconsin Madison, WI 53706	Seminar on Principalship: The Principal in the IGE School 3 credit course	Ac. Year	Graduate
Russell Burgett, Margaret Woods, R. Keith Woods University of Wisconsin Platteville, WI 53818	Introduction to IGE	Ac. Year	Undergrad/ Graduate
Russell Burgett, Margaret Woods, R. Keith Woods University of Wisconsin Platteville, WI 53818	Curriculum Planning: Wisconsin Design	Ac. Year	Undergrad/ Graduate
Russell Burgett, Margaret Woods, R. Keith Woods University of Wisconsin Platteville, WI 53818	Curriculum Planning: Implementation of Mathematics in IGE	Ac. Year	Undergrad/ Graduate
Russell Burgett, Margaret Woods, R. Keith Woods University of Wisconsin Platteville, WI 53818	Curriculum Planning: Individually Guided Motivation	Ac. Year	Undergrad/ Graduate
Virgil J. Wise University of Wisconsin Whitewater, WI 53190	Introduction to IGE 3 credits	Ac. Year	Undergrad/ Graduate Inservice
Virgil J. Wise University of Wisconsin Whitewater, WI 53190	Instructional Programing in IGE 3 credits	Ac. Year	Graduate/ Inservice

The following modules are from a collection of modules for Elementary Teaching and Learning, developed by the Elementary Competency-Based Teacher Education faculty at the University of Toledo, Toledo, Ohio 43606. Completion of a cluster of modules leads to eight quarter hours of credit.

Professor	Title of Course	Time Offered	Students Enrolled
John Ahern	Social St. Planning	Ac. Year	Undergrad
John Ahern, Dean L. Meinke	Concept Attainment	Ac. Year	Undergrad
Stuart Cohen, Gary Cooke	Strategies for Changing Behavior	Ac. Year	Undergrad
Stuart Cohen, Carole Urbansok	Self-management	Ac. Year	Undergrad
Les Elsie, Sam Snyder	Observation of a School Instr. Unit	Ac. Year	Undergrad
Dean L. Meinke, Marcia L. Mutterer	Group Process	Ac. Year	Undergrad
Dean L. Meinke, Marcia L. Mutterer	Learning Theory and Motivation	Ac. Year	Undergrad
Dean L. Meinke, Marcia L. Mutterer	Problem Solving	Ac. Year	Undergrad
Hughes Moir	Children's Lit.: Poetry for Children	Ac. Year	Undergrad
George Shirk	Teaching Math in the Elementary School	Ac. Year	Undergrad
Jerry Underfer	Teaching Science in the Elementary School	Ac. Year	Undergrad

EXAMPLES OF PROGRAMS DEALING WITH IGE

Dr. Richard Ishler, Assistant Dean College of Education University of Toledo Toledo, OH 43606	Master's Degree Program in Individually Guided Education and the Multiunit School
Dr. Warren Kallenbach School of Education Room 219 San Jose State University San Jose, CA 95192	Master's Degree Program in Instructional Technology for IGE Unit Leader
Dr. Max Poole, Chairman Department of Elementary Education University of Wisconsin-Eau Claire Eau Claire, WI 54701	Monograph No. 1: Performance-Based Graduate Courses for Individually Guided Education
Dr. Richard Wollin Chairman-on-leave-of-absence Department of Education Southwest Minnesota State College Marshall, MN 56258	"Teacher Education at Southwest Minnesota State College" -- Paper prepared by Dr. Richard Wollin

GPO 810-034-6

APPENDIX G

Agenda for SICC Planning Workshop
September 30-October 2, 1974

1974 NATIONAL PLANNING WORKSHOP

for

STATE IGE COORDINATING COUNCILS

September 30-October 2, 1974

TENTATIVE AGENDA

Planned by the

National Workshop Planning Committee*

Hosted by the

State IGE Network of Indiana
Terry Jackson, State IGE Coordinator

Supported by the

Wisconsin Research and Development Center for Cognitive Learning

and the

University of Wisconsin Sears-Roebuck Foundation Teacher Education Project

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*Mary Baban, Les Bernal, Ken Carlson, Ron Horn, Ross Johnson, Warren Kallenbach, Wayne Krula, Walt Krupa, Bill Phillips, Dick Rasmussen, Walt Serum, Ed Weinswig

1974 NATIONAL PLANNING WORKSHOP
for
STATE IGE COORDINATING COUNCILS

DATE: September 30-October 2, 1974

LOCATION: Pilgrim Inn, Indianapolis, Indiana

PURPOSE OF WORKSHOP:

To provide representatives and guests of State IGE Coordinating Councils an opportunity to prepare long-range plans for the implementation of IGE according to the four-phase model of implementation described in the Manual for Starting and Maintaining State IGE Networks.

OBJECTIVES OF WORKSHOP:

A. At the end of the workshop each State IGE Coordinating Council will have developed, in writing, a set of initial plans for implementing IGE in its respective state for the 1974-75 and 1975-76 school years. Such plans will be described in terms of performance objectives related to the following broad outcomes for State IGE Networks:

1. assisting schools in making the changeover to IGE,
2. providing inservice to established IGE schools,
3. introducing IGE into undergraduate programs for the purpose of preparing prospective IGE teachers,
4. planning, developing, and providing IGE graduate programs for unit leaders and staff teachers, and

5. planning, developing, and providing IGE graduate programs for building principals and other school administrators.

B. At the end of the workshop each SICC that has not yet done so will have identified a task force, or task forces, for each of the five outcomes; such task forces are to assess needs and develop strategies for accomplishing the performance objectives within each of the outcomes for State IGE Networks. Each SICC that has already assessed needs and developed strategies will plan the more detailed activities and time schedule for implementing each performance objective.

FORMAT OF WORKSHOP:

Workshop sessions are designed so that some sessions are devoted to input and discussion in the context of the total group. Input sessions are followed by planning and/or working sessions for SICC representatives in both role alike groups and as SICCs.

A coordinating committee consisting of two SEA, two TEI, two IEA, and two LEA representatives will be selected during the first day of the workshop. Its purpose will be to evaluate the progress of the workshop in terms of the purpose and objectives and to suggest and plan changes should such be necessary.

In addition to the input and work sessions, there will be self-host dinners with featured speakers on the evenings of September 30 and October 1. Lunches will be provided on a self-host basis for all participants.

EXPECTATIONS FOLLOWING THE WORKSHOP:

It is expected that the plans developed at the workshop will be used as the basis for developing and strengthening the organizational elements of the state IGE networks. Such plans as may be developed should be reviewed by the RICCs and the total SICC in each state before they are considered final; reviews might be completed by mid December, 1974. Finally, such plans will help both parties meet the performance objectives outlined in the subcontracts and/or memoranda of agreement currently in force or being negotiated between the states and the UW/SRF Project and/or the R & D Center.

AGENDA

SUNDAY, SEPTEMBER 29, 1974

8:00 P.M. Planning Session (Room 135)

Meeting of workshop staff and chairperson of each State IGE Coordinating Council (SICC) to prepare for workshop activities

MONDAY, SEPTEMBER 30, 1974

8:00 A.M. Registration (Lower Lobby Area)

8:30 Welcome and Opening Comments (Banquet Room)

—Dr. Leslie C. Bernal, Chairman, National Planning Committee
—Dr. Terry Jackson, Indiana State IGE Coordinator
—Dr. Harold H. Negley, Chief State School Officer, State of Indiana

8:45 Reports from the R & D Center and the UW/SRF Project (Banquet Room)

—Dr. Herbert J. Klausmeier, UW/SRF Project
—Dr. James E. Walter, R & D Center
—Dr. Nancy Evers, R & D Center
—Ms. Debbie Stewart, R & D Center

10:00 Break

10:15 Session A-1: Outcomes for State IGE Networks and Workshop Format (Total Group) (Banquet Room)

—Dr. James E. Walter

11:00 Session A-2: Each SICC will meet and discuss Outcomes 1-5 identified in Objective 1 for this workshop and establish priorities for determining performance objectives for each of the Outcomes. Each SICC chairperson is responsible for his own group.

New York SICC (Nursery - located between Rooms 112 & 113)
Indiana SICC (Room 135)
Remaining states meet in Banquet Room

12:00 Lunch (Nichibei Kai-Japanese Steak House, Lounge, Coffee Shop)

1:00 Session B-1: Roles, Responsibilities, and Relationships in a State IGE Network (Total Group) (Banquet Room)

—Dr. Herbert J. Klausmeier
—Dr. Lee Ellwood, Formerly With Texas Education Agency
—Dr. James E. Walter
—Dr. L. Joseph Lins, UW/SRF Project

MONDAY, SEPTEMBER 30, 1974 (Continued)

1:00 Alternate Session B-1: IGE Awareness Program for SICC invited participants who are not familiar with the basic components of IGE (Nursery)

—Ms. Elaine McGregor, R & D Center
—Dr. L. Joseph Lins

1:45 Session B-2: Persons from each type of agency represented at the workshop (SEA, TEI, IEA, and LEA) will meet in separate groups to share how each has carried out the role and responsibilities for the particular type of agency within each state network and how each sees future roles. Each will also share the kinds of relationships that have developed between the respective agency and other agencies and how these relationships might be improved.

—SEA, Dr. Booker Gardner, R & D Center (Small Banquet Room)
—TEI, Dr. Harold MacDermot, R & D Center (Large Banquet Room)
—IEA, Dr. James E. Walter (Large Banquet Room)
—LEA, Dr. Nancy Evers (Room 135)

2:45 Break (Banquet Room)

3:00 Session B-3: Individual SICC Meetings to Plan Performance Objectives and to identify a Task Force Relative to Outcome 1

New York SICC (Nursery - located between Rooms 112 & 113)
Indiana SICC (Room 135)
Remaining states meet in Banquet Room

4:45 Session B-4: SICCs will combine into groups of SICCs to present and critique the plans for meeting Outcome 1

Group assignments made on Sunday evening

5:30 Workshop Coordinating Committee Meeting (Room 135)

—R & D Staff and Agency Representatives

6:00 Self-Host Cocktail Hour (Banquet Room)

7:00 Dinner (Banquet Room)

—Guest Speaker: Dr. Martin W. Essex, Chief State School Officer, State of Ohio

TUESDAY, OCTOBER 1, 1974

8:00 A.M. Announcements (Banquet Room)

—Dr. Harold MacDermot

8:15 Session C-1: Selected Local Education Agency participants will conduct a panel discussion regarding the needs of LEAs relative to Outcome 2 and the possible role of the SICC in meeting these needs. (Total Group) (Banquet Room)

—Mr. Leslie C. Bernal, Moderator

9:00 Session C-2: Individual SICC Meetings to Plan Performance Objectives and to identify a Task Force Relative to Outcome 2

New York SICC (Nursery - located between Rooms 112 & 113)
Indiana SICC (Room 135)
Remaining states meet in Banquet Room

10:15 Break (Rear of Banquet Room) - at convenience of groups

10:45 Session C-3: SICCs will combine into groups of SICCs to present and critique plans for meeting Outcome 2

Group assignments made on Sunday evening

12:00 Noon Lunch (Nichibei Kai-Japanese Steak House, Lounge, Coffee Shop)

1:00 P.M. Session D-1: Local Education Agency, Teacher Education and State Education Agency Personnel will discuss how teacher education institutions have become involved in the implementation of IGE in cooperation with state and local agencies and how the teacher education on campus program may be changed as a result of that involvement

—Dr. Herbert J. Klausmeier, Chairperson
—Dr. Lee Ellwood
—Ms. Catherine Farmer, Tomah, Wisconsin Public Schools
—Dr. Edward Weinswig, University of Hartford - undergraduate training
—Dr. Juanita Sorenson, University of Wisconsin-Eau Claire - graduate program for unit leaders
—Dr. James Lipham, University of Wisconsin-Madison - graduate program for building principals
(Total Group) (Banquet Room)

2:45 Break

3:00 Session D-2: Individual SICC Meetings to Plan Performance Objectives and to identify a Task Force Relative to Outcome 3

New York SICC (Nursery - located between Rooms 112 & 113)
Indiana SICC (Room 135)
Remaining states meet in Banquet Room

TUESDAY, OCTOBER 1, 1974 (Continued)

4:30 Session D-3: SICCs will combine into groups of SICCs to present and critique plans for meeting Outcome 3

Group assignments made on Sunday evening

5:00 Workshop Coordinating Committee Meeting (Room 135)

—R & D Staff and Agency Representatives

6:00 Dinner (Banquet Room)

7:00 Speakers: Dr. Herbert J. Klausmeier, The IPM Revisited
Dr. James E. Walter, Regional IGE Centers

WEDNESDAY, OCTOBER 2, 1974

8:00 A.M. Announcements (Banquet Room)

—Dr. Harold MacDermot

8:15 Session E-1: Representatives from selected teacher education institutions will present and discuss how they as institutions have been involved in assisting schools make the changeover and assisting continuing IGE schools in refining their efforts through off campus inservice programs (Total Group) (Banquet Room)

—Dr. Herbert J. Klausmeier, Chairperson
—Dr. Warren Kallenbach, San Jose State University
—Dr. John Vaughn, Indiana University
—Dr. Al Leep, Ohio University

9:15 Session E-2: Individual SICC Meetings to Plan Performance Objectives and to identify a Task Force Relative to Outcomes 4 and 5

New York SICC (Nursery - located between Rooms 112 & 113)
Indiana SICC (Room 135)
Remaining states meet in Banquet Room

10:30 Break (Rear of Banquet Room) - at convenience of groups

11:15 Session E-3: SICCs will combine into groups of SICCs to present and critique plans for meeting Outcomes 4 and 5

Group assignments made on Sunday evening

12:00 Noon Lunch (Nichibei Kai-Japanese Steak House, Lounge, Coffee Shop)

WEDNESDAY, OCTOBER 2, 1974 (Continued)

1:00 P.M. Session F: The Workshop Coordinating Committee in a panel discussion will bring the planning conference to a focus and provide direction to individual agency representatives (Total Group) (Banquet Room)

—Dr. James E. Walter, Moderator

1:30 Session G: Persons from each type of agency represented (SEA, TEI, IEA, and LEA) will meet in separate groups. Members of the Workshop Coordinating Committee will serve as group leaders in directing a process of summarizing planning activities and identifying problems.

SEA (Large Banquet Room)
LEA (Small Banquet Room)
IEA (Room 135)
TEA (Nursery)

3:15 Break

3:30 Session H: Selected State Coordinators familiar with the strategies of both the R & D Center and /I/D/E/A/ will compare and discuss such strategies in terms of the following: (Total Group) (Banquet Room)

Implementation Requirements and Support
—Dr. Leslie Bernal
Terminology and Blend
—Dr. Anthony Conte, Director, New Careers in Education,
New Jersey State Department of Education

4:30 Planning Conference Wrap-Up (Banquet Room)

—Dr. James E. Walter

APPENDIX H

Massachusetts SICC Plans for the Implementation of IGE

MASSACHUSETTS

Outcome One: assisting schools in making the changeover to IGE

Awareness:

1.0. Cooperating with the State Regional Education centers and utilizing the Wisconsin prototypic agenda, the State IGE Coordinating Council will conduct a minimum of four awareness sessions in western, northeast, southeast, and central Massachusetts. Each session will consist of one day in duration and will include decision makers representing the State Department of Education, central office personnel of the LEA's, teacher educators, principals and community representatives.

1.1. By November 1, 1974, an information specialist, cooperating with the State IGE Coordinating Council will plan, design and establish an information system to communicate the concepts of IGE to various interested publics.

Commitment:

2.0. As a result of interest generated by the regional awareness conferences, the State IGE Coordinating Council will conduct appropriate commitment activities, i.e., clue-in, school visitations, and will hold workshops at appropriate locations within the state.

Changeover:

3.0. Upon the commitment to adopt the IGE concepts, the State IGE Coordinating Council will plan, design and conduct appropriate leadership training programs to provide participants with the skills and attitudes necessary to implement the outcomes of IGE.

4.0. The State IGE Coordinating Council will continually participate, cooperate, consult and communicate with state, regional, and national organizations to support the individualization of instruction.

MASSACHUSETTS

Outcome Two: providing inservice to established IGE schools

SICC Performance Objectives:

1.0. Following a needs assessment conducted by each league facilitator in April of each year, a task force will be established by the SICC to plan, develop, and implement appropriate activities, i.e., workshops, clinical experiences, state-wide conferences to meet the needs of the leagues so identified.

2.0. During the fall, winter, and spring of each year, the SICC will conduct a minimum of three meetings for league facilitators to exchange information and critique activities and future plans.

3.0. An information specialist, cooperating with the SICC, will acquire, catalogue, store and disseminate information concerning processes and products of interest to IGE league facilitators upon request.

4.0. By January 1, 1975, an Evaluation Task Force will be established by the SICC to assist participating school districts in developing plans for evaluation to include needs assessment, process and product evaluation, staff development and monitoring activities.

MASSACHUSETTS

Outcome Three: introducing IGE into undergraduate programs for the purpose of preparing prospective IGE teachers

SICC Performance Objectives:

1.0. By January 1, 1975, the SICC will identify and communicate with selected colleges and universities within the state to initiate plans for providing undergraduate programs in IGE as a process for individualizing instruction.

2.0. During June of 1975, the SICC will plan and implement a three- to five-day invitational workshop for interested teacher educators in New England dealing with the concepts, skills, and attitudes inherent in IGE. A major outcome of this workshop will be the design of at least one course focusing on IGE concepts.

3.0. During October and December of 1975, a task force appointed by the SICC will conduct two discussion and critiquing sessions for participants of the June workshop. The primary focus of the sessions will be to assist participants in improving and refining the courses introduced.

MASSACHUSETTS

Outcome Four: planning, developing, and providing IGE graduate programs for unit leaders and staff teachers

SICC Performance Objectives:

1.0. By January 1, 1975, the SICC will identify and communicate with selected colleges and universities within the state to initiate plans for providing graduate programs in IGE as a process for individualizing instruction.

2.0. During June of 1975, the SICC will plan and implement a three- to five-day invitational workshop for interested teacher educators in New England dealing with the concepts, skills, and attitudes inherent in IGE. A major outcome of the workshop will be the design of a graduate course(s) focusing on IGE concepts.

3.0. By October and December of 1975, a task force appointed by the SICC will conduct two discussion and critiquing sessions for participants of the June workshop. The primary focus of the sessions will be to assist participants in improving and refining the graduate course introduced.

Outcome Five: planning, developing, and providing IGE graduate programs for building principals and other school administrators

SICC Performance Objectives:

1.0. By November 1, 1974, the SICC chairperson will design and conduct a needs assessment of principals, other administrators, and unit leaders of the school districts in the state involved in IGE.

2.0. Following a needs assessment of principals, and administrators, and unit leaders of the various IGE school districts in Massachusetts, the SICC will appoint a task force to plan, develop, and implement a modularized, competency-based, graduate-level leadership program to initiate during the summer of 1975 to provide participants with the concepts, skills, and attitudes necessary to function more effectively in IGE schools.

GPO 810-034-3

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